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EmpowHR – Version 9.0 Section 15 – Person Model

TITLE I
Payroll/Personnel Manual

CHAPTER 17
EmpowHR

SECTION 15
Person Model

Table Of Contents

Person Model

The Person Model is a term used to describe the information captured about a person and how the person is related to the organization. A person is important to an organization for many different reasons at many different times throughout their lifetime. Each relationship may require different attributes and different processing.

With the ***EmpowHR*** Person Model, agencies can track the personal information about the person in one place with no redundant data. The relationships that a person has to the organization are tracked in a different area of the system. For example, the user may have a person who is now an employee but was previously a contingent worker. The system tracks this person using one ID, which enables their history as a contingent worker to exist along with their history as an employee.

While ***EmpowHR*** is primarily a Human Resource based system, agencies may want to track people that have more than just a worker type of relationship to their organization and would also need to provide secure access to their data just as you would for a worker.

The Person Model supports the storing and tracking of three Person Types within one centralized repository. This enables the user to manage and report on all types of workers from seasonal to permanent.

The three Person Types are:

- Employee (EMP) - The relationship of a person who is hired to provide services to an organization on a regular basis in exchange for compensation and who does not provide these services as part of an independent business.
- Contingent Worker (CWR) - The relationship of a person who provides services to another entity under terms specified in a contract on a non-permanent basis such as:
    - Independent Contractors
    - Temporary Workers
    - Consultants
    - Auditors
- Person of Interest (POI) - A person who does not have an employment or a Contingent Worker relationship, but who is still of interest to the organization such as:
    - Cobra Participants
    - Pension Payees
    - External Students and Instructors
    - Volunteers

Person Model allows the user to perform the following functions:

- Create a person
- Provide a Person checklist

- Create organizational relationships
- Create worker organizational relationships and instances
- Provide additional assignment or new instance option
- Provide instance dates versus assignment dates
- Promote an assignment to an instance
- Review a person's organizational relationships

This section includes the following topics:

Add A Person

The Add a Person component requires a person ID. There are two ways to assign an ID :

- Automatic ID assignment allows the system to generate ID's sequentially as new people are added.

  OR

- Manual ID assignment allows the user to enter the IDs, using any system that they choose for the organization. Assigning IDs manually is the only way that the user can include alphabetical characters in the IDs.

Note: To avoid maintaining two different sets of IDs, it is recommended that the user use only one method.

To add a person:

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Biographical*** menu item.
4. Select the ***Add A Person*** component. The Add A Person tab page (**Figure 1**) is displayed.

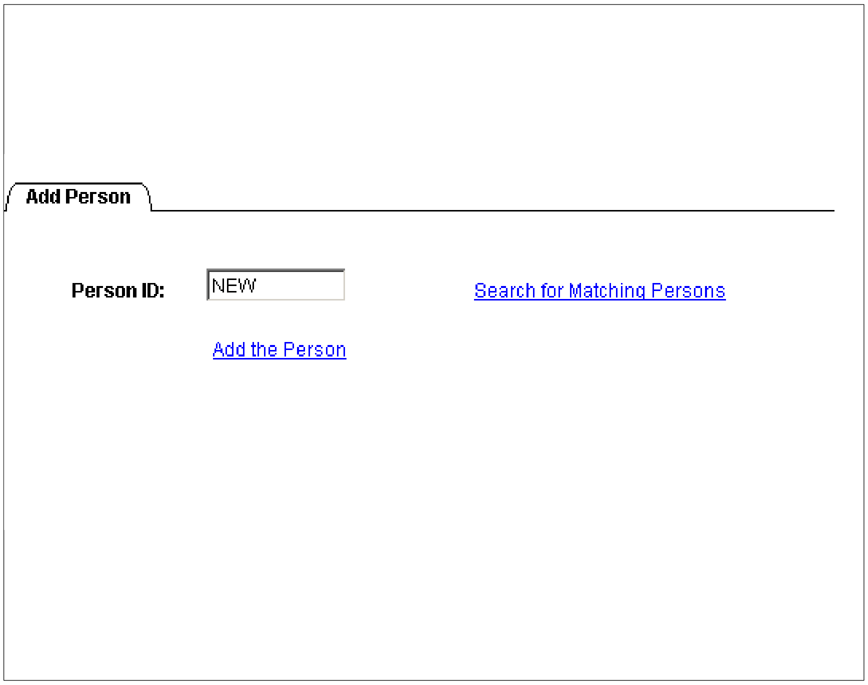

Figure 1. Add A Person tab page

5. Complete the field as follows:

Person ID

This field is populated with the system-assigned ID when you are adding a new person. The value will display as **`New`** until the record is saved.

6. Click the ***Add the Person*** link. The Biographical Details tab - Add A Person(**Figure 2**) is displayed.

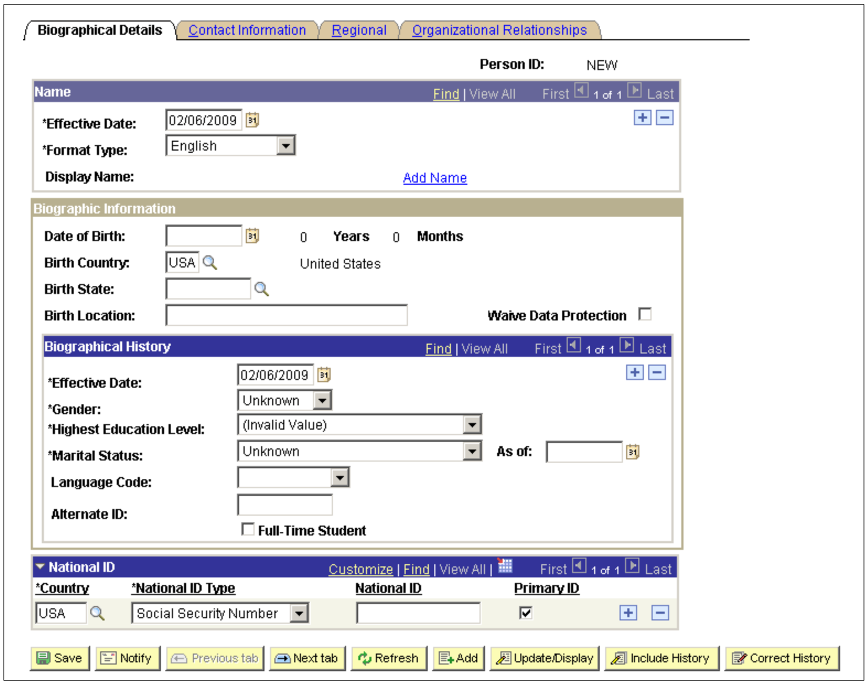

Figure 2. Biographical Details tab - Add A Person page

7. Complete the fields as follows:

Person ID

This field is populated with the system-assigned ID when you are adding a new person. The value will display as **`New`** until the record is saved. If the Person ID was entered manuualy, the page field displays the value that was entered.

***Effective Date**

Enter the effective date of the action or select a date by clicking the calendar icon.

***Format Type**

This field defaults to **`English`**. To change, select a format type from the drop-down list.

Display Name

This field is populated with data entered from the ***Add Name*** link. See field instructions for Add a Name.

Date of Birth	Enter the persons date of birth or select a date by clicking the calendar icon. The calculated age is displayed to the right of the field. If this field is left blank, a warning message appears when the record is saved. The date of birth is not required, however; this information is used to calculate a person's age in some benefit and payroll tasks. It also calculates dates, such as the expected retirement date, based on the person's age.
Birth Country	Enter the birth country or select a country by clicking the search icon. Based on the selected country, the system might display additional fields.
Birth State	Enter the birth state or select a state by clicking the search icon.
Birth Location	Enter the birth location. Usually a city, town, or village.
Waive Data Protection	Check this box if the employee's consent to share personal data with users in other European Union member nations is obtained. European community employement and personal privacy legislation specifies that personnel information can't be passed across countries in the European Union without authorization from the employee.
***Effective Date**	Enter the effective date or select a date by clicking the calendar icon.
***Gender**	Select the applicable gender from the drop-down list. Valid values are **`Male`**, **`Female`**, and **`Unknown`**.

***Highest Education Level**

Select the applicable education level from the drop-down list. The valid values are as follows:

Highest Education Level Valid Values

`1-Yr College`
`2-Yrs College`
`3-Yrs College`
`6th-Yr Degree`
`Associate Degree`
`Bachelor’s Degree`
`Compl Terminal Occupational Pg`
`Doctorate Degree`
`Elementary School Completed`
`First Professional`
`HS Graduate or Equivalency`
`Master’s Degree`
`No Formal Education`
`Post 6th-Yr Degree`
`Post - Bachelor’s Work`
`Post - Doctorate Work`
`Post - First Professional`
`Post - Master’s Work`
`Some College`
`Some HS - Didn’t Graduate`
`Some Terminal Occupational Prg`

***Marital Status**

Select the applicable marital status. The valid values are as follows:

Marital Status Valid Values

`Common-Law`
`Divorced`
`Head of Household`
`Married`
`Not Applicable`
`Separated`
`Single`
`Unknown`
`Widowed`

As Of

Enter the date or select a date by clicking on the calendar icon.

Language Code	Select the person's native or preferred language from the drop-down list. The valid values are as follows:
	Language Code Valid Values
	`Can French`
	`Danish`
	`Dutch`
	`English`
	`French`
	`German`
	`Greek`
	`Intl Eng`
	`Italian`
	`Japanese`
	`Korean`
	`Portuguese`
	`S Chinese`
	`Spanish`
	`Swedish`
	`T Chinese`
	`Thai`
	Note: Do not use this field ot record the organization's official language or to rate a worker's proficiency in speaking, reading, or writing vauious languages.

Alternate ID	Enter the alternate ID if the use of a second type of ID is applicble.
Full-Time Student	Check this box if the person is a full-time student.
***Country**	Select the country from the drop-down list that issued the worker's national ID.
National ID Type	This field defaults to Social Security Number and cannot be changed.
National ID	Enter the Social Security Number.
Primary ID	Check this box if this ID is the person's primary ID. If this is the only data row for this person, the box is checked by default.

8. Select the Contact Information tab. The Contact Information tab - Add A Person page (**Figure 3**) is displayed.

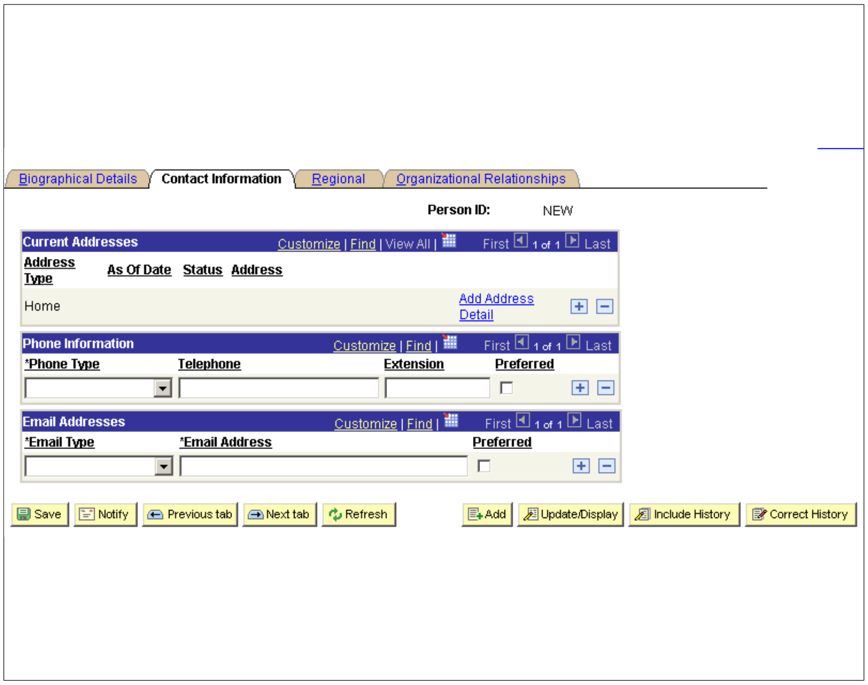

Figure 3. Contact Information tab - Add A Person page

9. Complete the fields as follows:

Person ID	This field is populated with the system-assigned ID when you are adding a new person. The value will display as **`New`** until the record is saved.
Address Type	Select the type of address that appears in this row. The field is populated with **`Home`** for the first address entered. Click **+** to select additional address types and add additional addresses. Valid Values are as follows:

Address Type Valid Values

`Billing`

`Business`

`Campus`

`Check`

`Dormitory`

`Legal`

`Mailing`

`Other`

`Other 2`

`Permanent`

`Preferred`

`Veteran`

As Of	This field is populated with the information entered from the ***Add Address Detail*** link. Refer to field instructions below.
Status	This field is populated with the information entered from the ***Add Address Detail*** link. Refer to Add Address Detail.
Address	This field is populated with the information entered from the ***Add Address Detail*** link. Refer to Add Address.
***Phone Type**	Select the applicable phone type that corresponds with the telephone number. Select **`Main`** to designate a phone number as the individual's primary contact number. The valid values are as follows: **Phone Type Valid Values** **`Business`** **`Campus`** **`Dormitory`** **`FAX`** **`Home`** **`Main`** **`Mobile`** **`Other`** **`Pager 1`** **`Pager 2`** **`Telex`**
Telephone	Enter the telephone number.
Extension	Enter the extension if applicable.
Preferred	Check this box if this is the person's preferred phone number.

***Email Type**

Select the email type from the drop-down list. Click **+** to select additional email address types and add additional email addresses. The valid values are as follows:

Email Type Valid Values

`Blackberry`

`Business`

`Campus`

`Dorm`

`Home`

`Other`

***Email Address**

Enter the email address.

Preferred

Check this box if this is the person's preferred email address.

10. Select the Regional tab. The Regional tab - Add A Person page (**Figure 4**) is displayed.

Figure 4. Regional tab - Add A Person page

11. Complete the fields as follows:

Person ID

This field is populated with the system-assigned ID when you are adding a new person. The value will display as **`New`** until the record is saved.

Regulatory Region	Enter the regulatory region or select a region by clicking the search icon.
Ethnic Group	Enter the ethnic group or select a group by clicking the search icon.
Primary	Check this box if applicable.
Effective Date	Enter an effective date or select a date by clicking on the calendar icon.
Date Entitled To Medicare	Enter a date or select a date by clicking on the calendar icon on which this person is entitled to receive Medicare coverage.

Military Status	Select a military status from the drop-down list. The valid values are as follows:
	Military Status Valid Values
	`Not a Veteran`
	`Not a Vietnam-Era Veteran`
	`Post-Vietnam-Era Veteran`
	`Pre-Vietnam-Era Veteran`
	`Vietnam-Era Veteran`

Citizenship (Proof 1)	Enter the first form of identification (for example: passport, Social Security card, etc.) to prove U.S. citizenship.
Citizenship (Proof 2)	Enter the second form of identification (for example: passport, Social Security card, etc.) to prove U.S. citizenship.
Eligible To Work In U.S.	Check this box if the person is eligible to work in the U.S.
***Smoker**	Select the applicable answer from the drop-down list. The valid values are `No` and `Yes`.
***As Of**	Enter the applicable date or select a date by clicking on the calendar icon on which the person started smoking.

12. Select the Organizational Relationships tab. The Organizational Relationships tab - Add A Person page (**Figure 5**) is displayed.

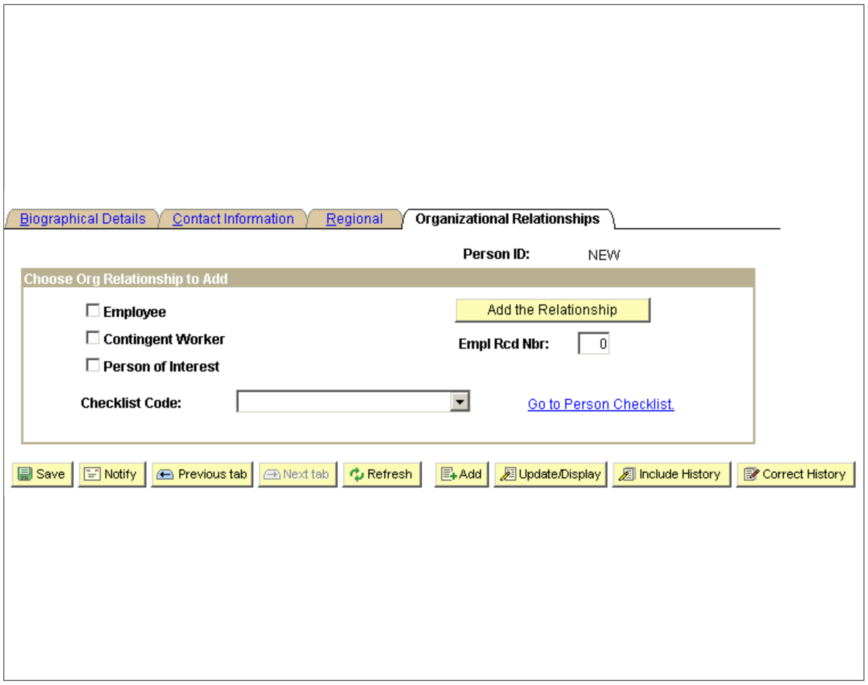

Figure 5. Organizational Relationships tab - Add A Person page

13. Click **Save** to save the new person.

14. At this point you must establish the organizational relationship of the new person. To establish the organizational relationship, see Establishing the Organizational Relationship.

Step	Description
Check the ***Employee*** box	To establish an employee relationship.
Check the ***Contingent Worker*** box	To establish a contingent worker relationship.
Check the ***Person of Interest*** box	To establish a person of interest relationship.

Establishing a Relationship

Only one organizational relationship can be selected when creating the Personal Data record. Additional relationships cand be created directly from the New Employment Instance, New Contingent Worker Instance, Add Person of Interest Job and Add a POI type to a person components.

If a person is created without a job data record or POI type record, the system will save the person as a POI without job with a POI Type of Unknown. When a record is created and saved for theat person on the Add an Employment Instance component, Add a Contingent Worker component, Add a POI Instance component, or Add a POI Reltn. component, the system will delete the Unknown POI without job instance for that person.

This section contains the following topics:

Employee

To Add an Employee:

1. Check the ***Employee*** box.
2. Complete the fields as follows:

Person ID	This field is populated with the system-assigned ID when adding a new person. The value will display as **New** until the record is saved.
Empl Rcd Nbr	This field is populated with the next employee record number available for the person.

Checklist Code	Select the applicable checklist code from the drop-down menu to create a checklist for the person. The valid values are:

Checklist Code Valid Values

```
Applicant Checklist
Applicant Checklist
Applicant Checklist
Applicant Checklist
Applicant Hire Checklist
Applicants' Checklist UK
Credentialing for Health Care
Domestic Loan Assgnmnt Chcklst
Domestic Loan Assgnmnt Chcklst
Foreign Loan Arrival Chcklst
Foreign Loan Departure Chcklst
Foreign Loan Host Checklist
Foreign Srvc Arrival Checklist
Foreign Srvc Departure Chklst
Foreign Srvc Host Checklist
Hire
Immunization Checklist
Local Co Govt New Hire Chcklst
Netherlands Monitor Absences
New Hire Checklist
Pre-Employment Checklist
Reptraition Checklist
Reptraition Checklist
Termination
Termination Checklist
Transfer
```

3. Click the ***Go To Person Checklist*** to create a checklist for the person. The Person Checklist page is displayed. For more information see Person Checklist.

4. Click **Add the Relationship** to save the data and establish the new person's organizational relationship. The Data Control tab - Add Employee page (**Figure 6**) is displayed. For more information on PAR Processing, refer to Chapter 17, Section 5.

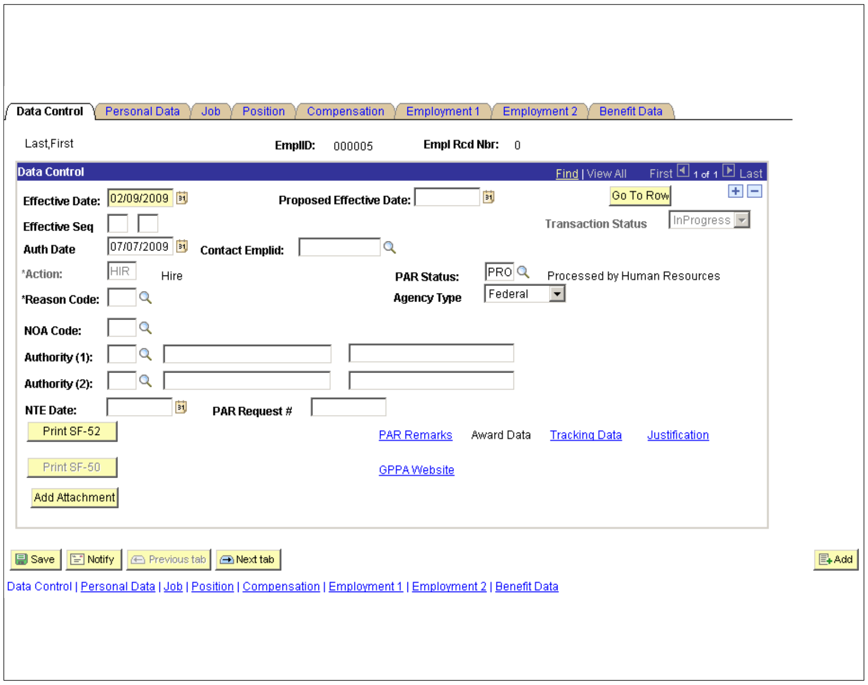

Figure 6. Data Control tab - Add An Employee page

Contingent Worker

To add a Contingent Worker or a Person of Interest with job data:

1. Check the ***Contingent Worker*** box.

2. Complete the fields as follows:

Person ID	This field is populated with the system-assigned ID when adding a new person. The value will display as **`New`** until the record is saved.
Empl Rcd Nbr	This field is populated with the next employee record number available for the person.

Checklist Code	Select the applicable checklist code from the drop-down list to create a checklist for the person. The valid values are:

Checklist Code Valid Values

```
Applicant Checklist
Applicant Checklist
Applicant Checklist
Applicant Checklist
Applicant Hire Checklist
Applicants' Checklist UK
Credentialing for Health Care
Domestic Loan Assgnmnt Chcklst
Domestic Loan Assgnmnt Chcklst
Foreign Loan Arrival Chcklst
Foreign Loan Departure Chcklst
Foreign Loan Host Checklist
Foreign Srvc Arrival Checklist
Foreign Srvc Departure Chklst
Foreign Srvc Host Checklist
Hire
Immunization Checklist
Local Co Govt New Hire Chcklst
Netherlands Monitor Absences
New Hire Checklist
Pre-Employment Checklist
Reptraition Checklist
Reptraition Checklist
Termination
Termination Checklist
Transfer
```

3. Click **Add the Relationship**. The Work Location tab - Contingent Worker page (**Figure 7**) is displayed.

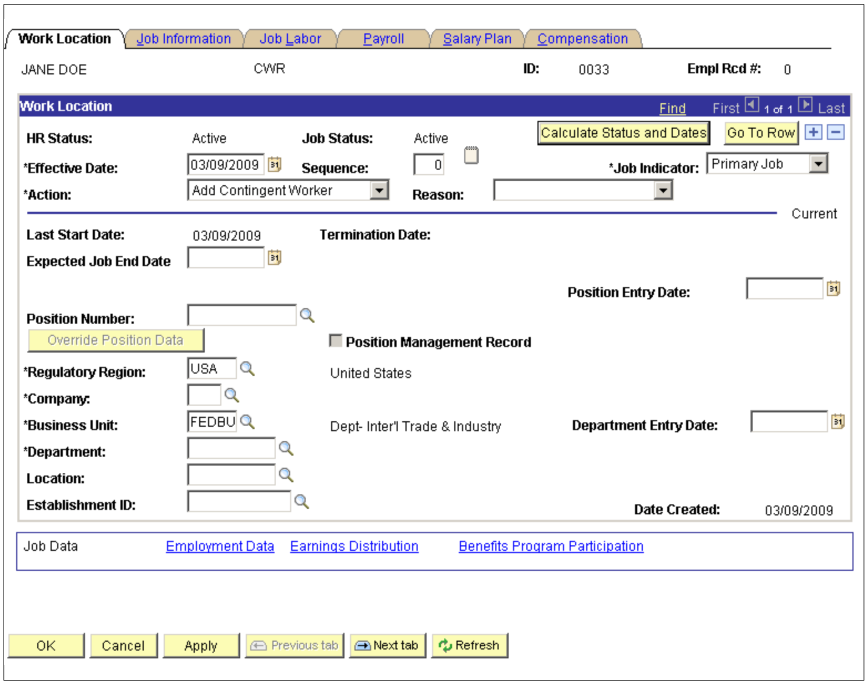

Figure 7. Work Location tab - Contingent Worker page

4. Complete the fields as follows:

ID	This field is populated.
Empl Rcd #	This field is populated with the employee record number for the person.
HR Status	This field is populated.
Job Status	This field is populated.
***Effective Date**	Enter the effective date or select a date by clicking the calendar icon. When a new instance with the action of Hire is added, the effective date entered becomes the hire and original hire date.
Sequence	Use this number to track multiple administrative actions that occur on the same day. The default value is `0`, the correct number for new instances.
***Job Indicator**	Select the applicable job indicator from the drop-down list. The valid values are **`Primary Job`**, **`Secondary Job`**, and **`Not Applicable`**. This field is used to process people with more than one organizational instance in a single organizational relationship.

***Action**	Select the action requiring you to create or modify this record from the drop-down menu. The system displays a default value when a new employment, contingent worker, or POI instance is created.
Reason	Select the reason requiring you to create or modify this record from the drop-down menu. The system displays a default value when a new employment, contingent worker, or POI instance is created. Valid values are
Last Start Date	Enter the most recent start date for this organizational instance.
Termination Date	This field is populated with the day before the termination effective date.
Expected Job End Date	Enter the expected job end date for this job or select a date by clicking on the calendar icon. If this job is a temporary assignment and a date is not entered here, a Temporary Assignment without End Date report can be ran to identify those assignments that do not have an end date. This date is necessary if you want the system to terminate this job and reactivate any substantive job that may be on hold. The system displays the day before the termination effective date as the termination date.
Position Entry Date	This field is populated with the effective date based on the position number entered for this person. The data can be overridden by clicking **Override Position Data**.

Position Number

Enter the position number or select a number by clicking on the search icon.

Define positions in the Add/Update Position Info component. Completing this field allows the system to complete position-related fields in the Job Data component with default data fromthe Add/Update Position Infor Component, including job code, department, location, supervisor level, reports to, and full- or part-time status. The corresponding fields become unavailable for entry.

A warning message will appear if a person is assigned to a position that is already filled and if the new appointment exceeds the maximum headcount for that position. The system calculates the headcount and displays the appropriate indicator in the Open//Filled field in the Add/Update Position Info component when assignments are changed.

Position Management Record

This box is selected when changes are made to fields in the Add/Update Position info component that initiate a system update of fields here. When this box is selected it indicates that the system inserts a data row on the Job Data pages.

***Regulatory Region**

This field is populated based on the regulatory region specified for the position this person is associated with. The data can be overridden by clicking **Override Position Data**.

If the pers is not assigned to a position, this field is populated with the regulatory region for the person, based on the user prefences. This entry can be overriden.

***Company**

This field is populated based on the company specified for the position associated with this person and cannot be modified. The data can be overridden by clicking **Override Position Data**.

This field is populated with a default company code if the person is not assigned to a position, but a company is assigned to a department in the department table.

If no company is designate on the Department tabe, enter a company or select a company by clicking the search icon.

***Business Unit**	This field is populated based on the business unit specified for the position associated with this person and cannot be modified. The data can be overridden by clicking **Override Position Data**. This field is populated with a default business unit if the person is not assigned to a position. The default can be overriden.
Department Entry Date	This field is populated.
***Department**	This field is populated based on the position number entered.
Location	This field is populated based on the position number entered.
Establishment ID	Enter the establishment ID or select an ID by clicking on the search icon.
Date Created	This field is populated.

5. Click **Calculate Status and Dates** to calculate the person's HR, job, or payroll status and the employment dates so thatthe changes can be reviewed before the component is saved. This button is displayed when changes are made to the effective date or one or the status fields.

6. Click **Override Position Data** to enter exceptions tothe default position data for this person. This opens up ine unavailable fiels, incluiding Job Code and Depart, and entries in those fields can be overriden. For exa ple, the worker might have a higher salary grade than the standard grade that is associated with the position. When Override Position Data is clicked, the button becomes Use Position Data, and vice versa. This button is available only on new rows of data.

   Note: If the defaults for position-related data are overriden, the employee data must be maintained manually; the system doesn't update the position data on the Job Data pages with data from the Add/Update Position Info component unless Use Position Data is clicked.

7. Click the ***Job Information*** tab. The Job Information tab - Contingent Worker page (**Figure 8**) is displayed.

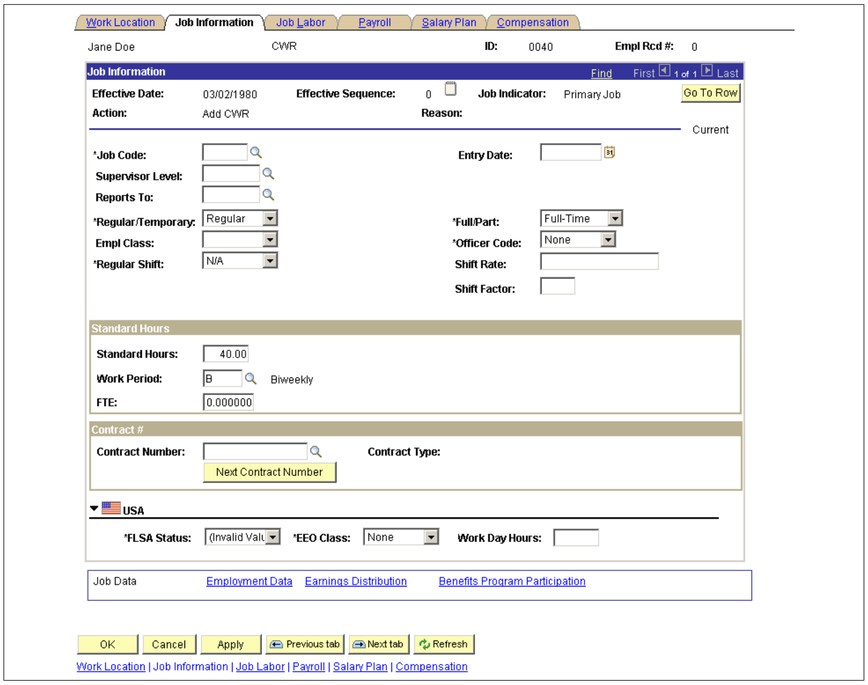

Figure 8. Job Information tab - Contingent Worker page

8. Complete the fields as follows:

ID	This field is populated.
Empl Rcd #	This field is populated with the employee record number for the person.
Effective Date	This field is populated based on the data selected on the Work Location tab.
Effective Sequence	This field is populated.
Job Indicator	This field is populated based on the data selected on the Work Location tab.
Action	This field is populated based on the data selected on the Work Location tab.
Reason	This field is populated based on the data selected on the Work Location tab.

***Job Code**

This field is populated based on the job code specified for the position associated with this person, the system enteres a default job code and cannot be modified. The data can be overridden by clicking **Override Position Data** on the work Location tab.

If the person is not assigned to a position, enter the job code or select a code by clicking the search icon.

Note: If this person is attached to a labor agreement on the Job Labor tab and that labor agreement is associated with job codes, a job code that is valid for the labor agreement must be selected.

Entry Date

This field is populated with the date on which the person is first assigned to thsi job code. If you are using position management, this field cannot be modified. The data can be overridden by clicking **Override Position Data** on the work Location tab.

Supervisor Level

Supervisor levels are a class of position that represent levels of some managerial or supervisory significance and can be used as another type of employee identifier.

If a specified supervisor level of this position is associated with this person, the system enters a default supervisor level and this field cannot be modified. The data can be overridden by clicking **Override Position Data** on the work Location tab.

If the person is not assigned to a position, enter the supervisor level or select a level by clicking the search icon.

Reports To

This field displays the position number, title, and name of the manager associated with this position.

If a specified reports to number for this position is associated with this person, the system enters a default value and this field cannot be modified. The data can be overridden by clicking **Override Position Data** on the work Location tab.

If thie person is not assigned to a position and is assigned a reports to ID to a department in the ?Department Table, a default reports to ID appears.

If the person is not assigned to a position, enter the reports to ID or select an ID by clicking the search icon.

***Regular/Temporary**

This field is populated based on the position number entered or selected and cannot be modified. The data can be overridden by clicking **Override Position Data** on the work Location tab.

***Full/Part**

This field is populated based on the position number entered or selected and cannot be modified. The data can be overridden by clicking **Override Position Data** on the work Location tab.

If the person is not assigned to a position, select the applicable value from the drop-down menu. The valid values are **`Full-time`** and **`Part-time`**.

Empl Class

Select the employee class from the drop down list. The valid values are:

Empl Class Valid Values

`Agency/Tmp`

`Apprentice`

`Assignee`

`Consultant`

`Contractor`

`Expatriate`

`Intern`

`N/A`

`Trainee`

***Officer Code**

Select the Officer Code from the drop down list. The valid values are:

Officer Code Valid Values

`Chairman`

`Director`

`None`

`Officer`

`President`

`Secretary`

`Treasurer`

`Vice Presi`

***Regular Shift**

This field is populated based on the position number associated with the person and cannot be modified. The data can be overridden by clicking **Override Position Data** on the work Location tab.

Select the appropriate shift if the worker is working shifts. If the worker soes not work shifts, leave the Shift Rate and Factor fiels blank. The default value is **`N/A`**.

Shift Rate

Enter the Shift Rate information.

Shift Factor	Enter the Shift Factor information.
Standard Hours	Enter the number of standard hours.
Work Period	Enter the Work Period or select a work period by clicking on the search icon.
FTE	Enter the FTE information.
Contract Number	Enter the contact number or select a number by clicking the search icon.
Contract Type	This field is populated information that corresponds with contract number entered or selected.
FLSA Status	Select the FLSA status from the drop down list. The valid values are **`Exmpt`** and **`Nonexempt`**. This field defaults to **`(Invalid Value)`**.
***EEO Class**	Select the EEO class from the drop down list. The valid values are: **`Exclude`** **`None`** **`Pr Trainee`** **`WC Trainee`**.
Work Day Hours	Enter the work day hours.

9. Click the ***Job Labor*** tab. The Job Labor tab - Contingent Worker page (**Figure 9**) is displayed.

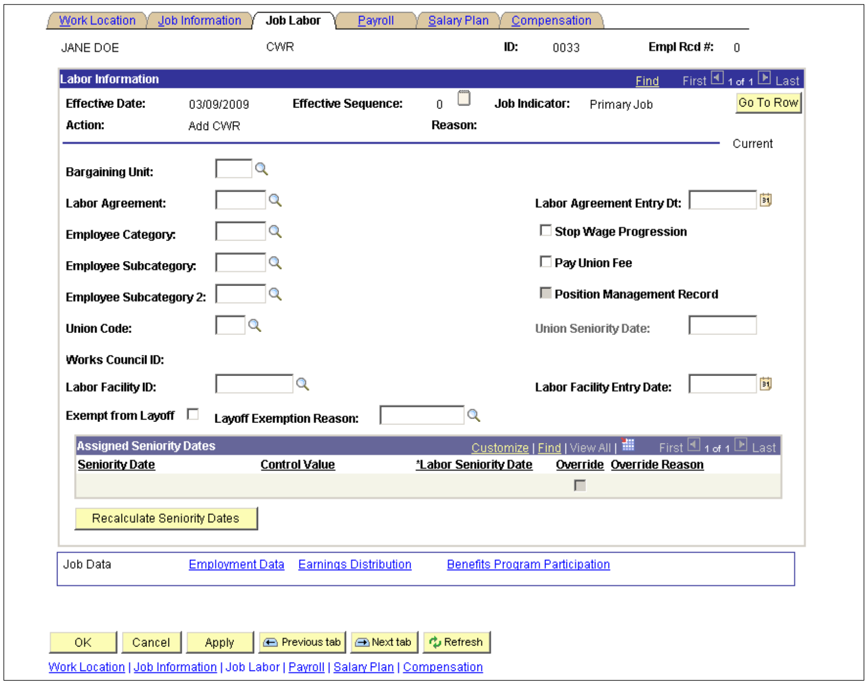

Figure 9. Job Labor tab - Contingent Worker page

10. Complete the fields as follows:

ID	This field is populated.
Empl Rcd #	This field is populated with the employee record number for the person.
Effective Date	This field is populated based on the data selected on the Work Location tab.
Effective Sequence	This field is populated.
Job Indicator	This field is populated based on the data selected on the Work Location tab.
Action	This field is populated based on the data selected on the Work Location tab.
Reason	This field is populated based on the data selected on the Work Location tab.
Bargaining Unit	Enter the bargaining unit to which the employee belongs or select a unit by clicking on the search icon.

Labor Agreement	Enter the labor agreement that applies to this worker or select an agreement by clicking on the search icon.
Labor Agreement Entry Dt	If this worker is part of a national labor agreement, enter the labor agreement entry date or select a date by clicking the calendar icon.
Employee Category	Enter the employee category to which the worker belongs under the labor agreement or select a category by clicking on the search icon.
Stop Wage Progression	Check this box if the selected job code is associated with a wage progression salary plan. The system will not accumulate hours towards a wage progression step for this worker. To resume wage progression, insert a new Job Data row and clear this check box.
Employee Subcategory	If the employee category selected for this person contains subcategories, this field appears. Enter the employee subcategory or select a subcategory by clicking on the search icon.
Pay Union Fee	Check this box if a union fee should be paid.
Employee Subcategory 2	If the employee subcategory selected for this person contains secondary subcategories, this field appears. Enter the second employee subcategory or select a second subcategory by clicking on the search icon.
Position Management Record	This field is populated whenever the system inserts this data by updating the incumbent to reflect user-made changes to the Position Management component.
Union Code	This field is populated based on the position number associated with a person and cannot be modified. The data can be overridden by clicking **Override Position Data** on the work Location tab.
Union Seniority Date	Enter the date on which the worker enters the union.
Works Council ID	Select the ID of the Works Council representing this employee.

Labor Facility ID	Enter the facility that this worker belongs to or select an ID by clicking on the search icon.
Labor Facility Entry Date	Enter the datethe worker began in the labor facility or select a date by clicking on the calendar icon.
Exempt From Layoff	Check this box if the worker is exempt from layoff.
Layoff Exemption Reason	Enter the layoff exemption reason or select a reason by clicking on the search icon.
Seniority Date	Enter the seniority date or select a date by clicking the calendar icon.
Control Value	
***Labor Seniority Date**	
Override	
Override Reason	

11. Click **Recalculate Seniority Dates** to recalculate seniority dates as needed.

12. Click the ***Payroll*** tab. The Payroll tab - Contingent Worker page (**Figure 9**) is displayed.

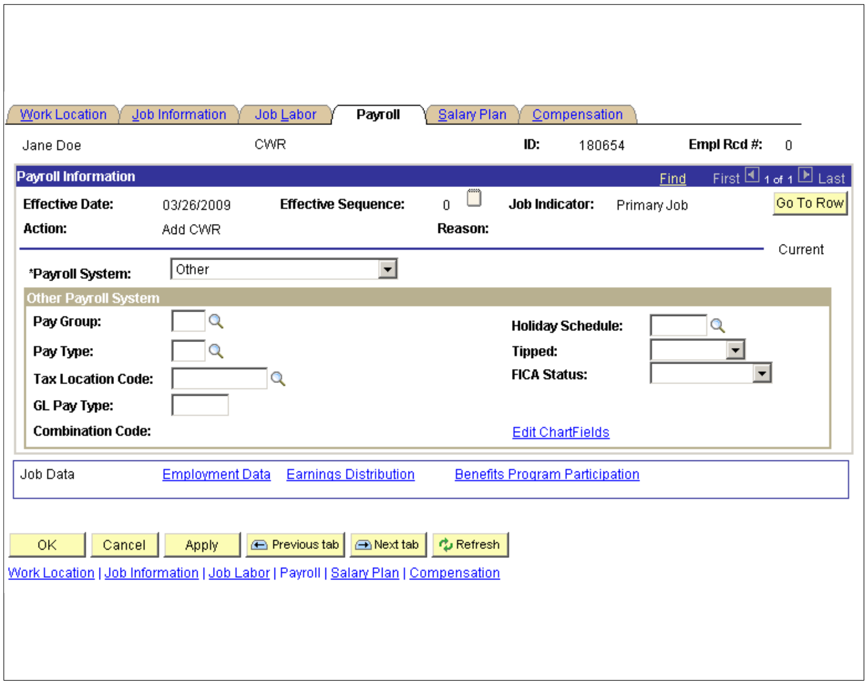

Figure 10. Payroll tab - Contingent Worker page

13. Complete the fields as follows:

ID	This field is populated.
Empl Rcd #	This field is populated with the employee record number for the person.
Effective Date	This field is populated based on the data selected on the Work Location tab.
Effective Sequence	This field is populated.
Job Indicator	This field is populated based on the data selected on the Work Location tab.
Action	This field is populated based on the data selected on the Work Location tab.
Reason	This field is populated based on the data selected on the Work Location tab.

***Payroll System**	Select the payroll system that is used to process this person's paycheck from the drop-down list. The valid values are:
	Payroll System Valid Values
	`Global Payroll`
	`Other`
	`Payroll Interface`
	`Payroll for North America`

Pay Group	Enter the pay group or select a group by clicking the search icon.
Holdiay Schedule	Enter the holiday schedule or select a schedule by clicking the search icon. If the user defined a default holiday schedule for the employee's location, the system displays it here. If the holiday schedule is left blank on the Location Profile page and the user entered a default on the Pay Group table, the system displays it here.
Pay Type	Enter the pay type or select a type by clicking on the search icon. This value depends on the pay group. The system completes the field with the default value from the Pay Group table. If a pay type doesn't exist for this pay group, establish one in the Pay Group table.

Tipped	Select the tipped information from the drop-down list. The valid values are:
	`Directly`
	`Indirectly`
	`Not Tipped`.

Tax Location Code	Enter the tax location code or select a code by clicking on the search icon.

FICA Status	Select the FICA status from the drop-down list. The valid values are:
	`Exempt`
	`Medicare Only`
	`Subject`.

GL Pay Type	
Combination Code	

14. Click the ***Edit Chart Fields*** link to access the ChartField common component for selecting ChartField values.

15. Click the ***Salary Plan*** tab. The Salary tab - Contingent Worker page (**Figure 9**) is displayed.

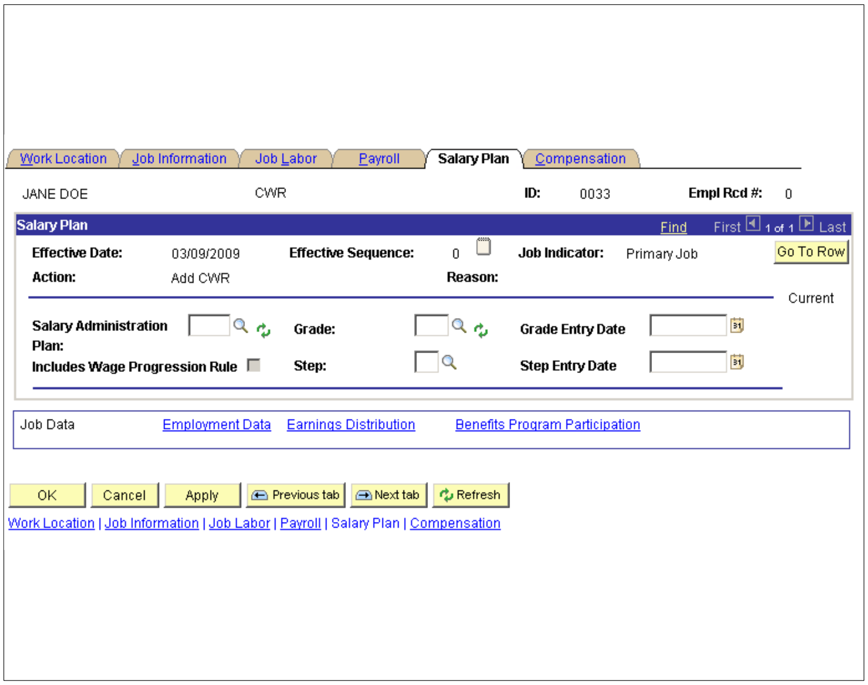

Figure 11. Salary Plan tab - Contingent Worker page

16. Complete the fields as follows:

ID	This field is populated.
Empl Rcd #	This field is populated with the employee record number for the person.
Effective Date	This field is populated based on the data selected on the Work Location tab.
Effective Sequence	This field is populated.
Job Indicator	This field is populated based on the data selected on the Work Location tab.
Action	This field is populated based on the data selected on the Work Location tab.

Reason — This field is populated based on the data selected on the Work Location tab.

Salary Administration — This field is populated based on the position number associated with a person. To modify this field, enter the salary administration or select an administration by clicking the search icon.

Grade — Enter the grade or select a grade by clicking the search icon.

Grade By Entry Date — Enter the date on which the person first joint this grade or select a date by clicking the calendar icon.

Includes Wage Progression Rule — This field is populated if the salary plan administration plan selected includes wage progression.

Step — Enter the step or select a step by clicking the search icon.

Step Entry Date — Enter the date on which the person first jointed this step or select a date by clicking the calendar icon.

17. Click the ***Compensation*** tab. The Compensation tab - Contingent Worker page (**Figure 9**) is displayed.

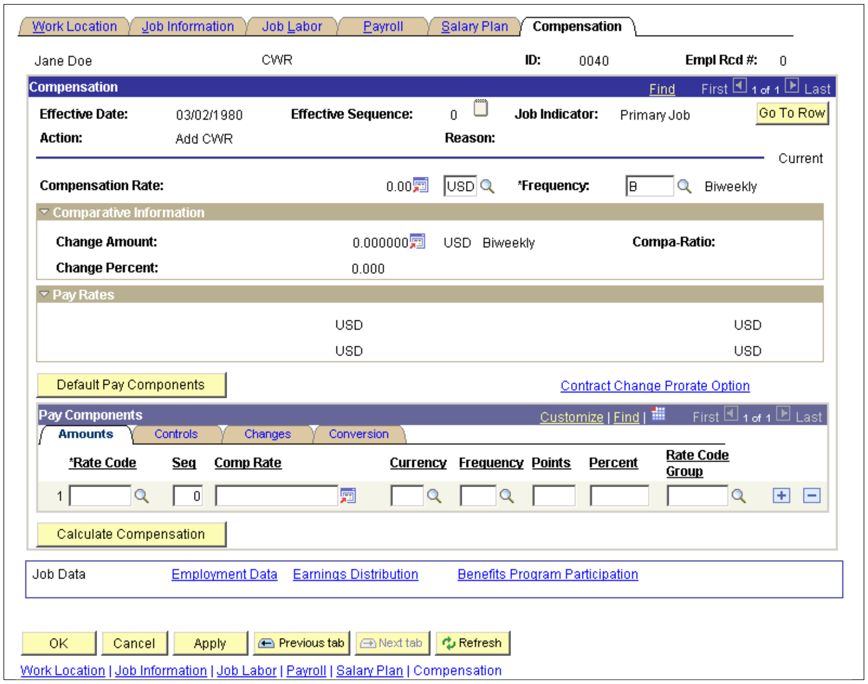

Figure 12. Compensation tab - Contingent Worker page

18. Complete the fields as follows:

ID	This field is populated.
Empl Rcd #	This field is populated with the employee record number for the person.
Effective Date	This field is populated based on the data selected on the Work Location tab.
Effective Sequence	This field is populated.
Job Indicator	This field is populated based on the data selected on the Work Location tab.
Action	This field is populated based on the data selected on the Work Location tab.
Reason	This field is populated based on the data selected on the Work Location tab.
Compensation Rate	This field is populated with the compensation rate for the person, which is the sum of all base pay salary componenets.
***Frequency**	Enter the frequency or select a frequency by clicking the search icon. The selection is displayed to the right of the field.
Change Amount	This field is populated with the change in the amount of compensation for the rate code.
Compa-Ratio	This field is populated with the percent-truough-range calculation, based on the salary plan and grade and the currency that the organization uses.
Change Percent	This field is populated with the percent of change in the amount of compensation for the rate code.

19. Click **Default Pay Components** to:

- Carry out rate code defaults (excluding seniority pay) based on the current values of designated job fields.

- Replace manual updates and old default values with the current default values.
- Recalculate the compensation package of affected person, including the compensation rate, currency, frequency, apply FTE, percent (including current rate code groups), salary points, automatically calculated permium, etc.
- Recalculate compensation-related fields, such as annual amounts or compa-ratio, on the Job Data record.

If this button is not clicked after updating relevant job data fiels, the system issues a warning when you attempt to save a new record. If **OK** is clicked, the system displays this page, where you can click this button and make any required changes. If this button is not clicked, the component package doesn't appear by default until the next time the default component logic is triggered (either when the botton is clicked or through a batch update process).

Pay Components/*Rate Code	Enter the rate code or select a code by clicking the search icon.
Pay Components/Seq	Enter the Sequence information.
Pay Components/Comp Rate	Enter the compensation rate or select a rate by clicking on the
Pay Components/Currency	Enter the currency or select the currency by clicking the search icon.
Pay Components/Frequency	Enter the frequency or select the frequency by clicking the search icon.
Pay Components/Points	Enter the points information.
Pay Components/Percent	Enter the percent.
Pay Components/Rate Code Group	Enter the rate code group or select a group by clicking on the search icon.

20. Click the ***Contract Change Prorate Option*** link to modify the person's contract proration options. The Controls tab - Pay Components section (**Figure 13**)is displayed.

21. Click the ***Controls*** tab in the Pay Components Section. The Controls tab - Pay Components section (**Figure 13**)is displayed.

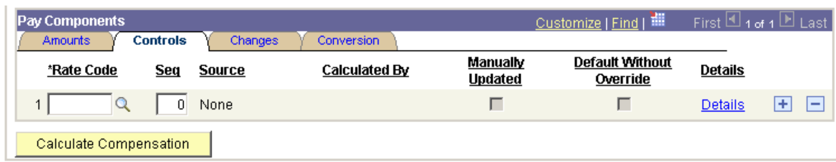

Figure 13. Controls tab - Pay Components section

***Rate Code**	Enter the rate code or select a code by clicking the search icon.
Seq	Enter the sequence.
Source	This field is populated with information from the sequence number entered.
Calculated By	
Manually Updated	Check this box if applicable.
Default Without Override	Check this box if applicable.

22. Click the ***Details*** link to view the details of the controls selected.

23. Click the ***Changes*** tab in the Pay Components Section. The Changes tab - Pay Components section (**Figure 14**)is displayed.

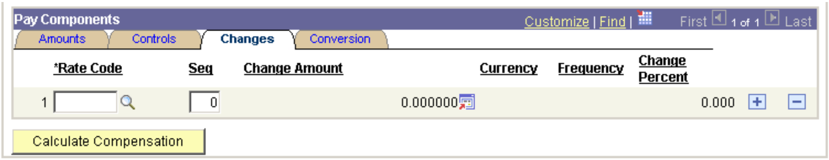

Figure 14. Changes tab - Pay Components section

***Rate Code**	Enter the rate code or select a code by clicking the search icon.
Seq	Enter the sequence.
Change Amount	
Currency	
Frequency	
Change Percent	

24. Click the ***Conversion*** tab in the Pay Components Section. The Conversion tab - Pay Components section (**Figure 15**)is displayed.

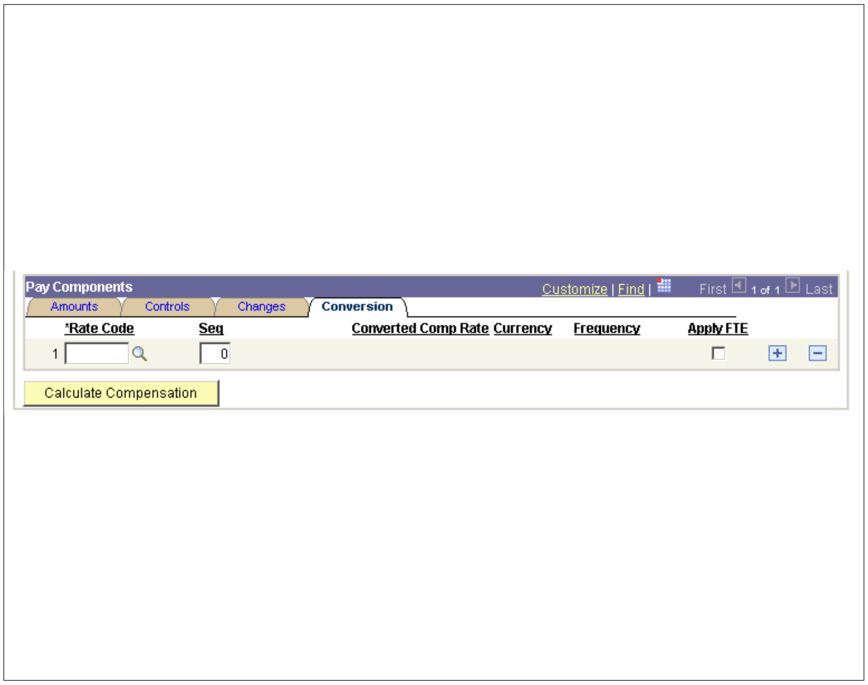

Figure 15. Conversion tab - Pay Components section

***Rate Code**	Enter the rate code or select a code by clicking the search icon.
Seq	Enter the sequence.
Converted Comp Rate	
Currency	
Frequency	
Apply FTE	Check this box if applicable.

25. Click **Calculate Compensation**.

26. At this point the following options are available:

Step	Description
Click **Ok**	
Click **Cancel**	
Click **Apply**	
Click **Previous Tab**	
Click **Next Tab**	
Click **Refresh**	

Person of Interest

To Add a Person of Interest without job data:

1. Check the ***Person of Interest*** box.

2. Select the type of Person of Interest to be added. Valid values are as follows:

Person of Interest Type Valid Values
Contracted HCM User
External Instructor
External Trainee
Global Payroll Payee
Other
Other Payee
Stock - Board Member
Stock - Non-HR Employee

3. Complete the fields as follows:

Person ID	This field is populated with the system-assigned ID when you are adding a new person. The value will display as **`New`** until the record is saved.
Empl Rcd Nbr	This field is populated.

Checklist Code	Select the applicable checklist code from the drop-down list. The valid values are:

Checklist Code Valid Values

```
Applicant Checklist
Applicant Checklist
Applicant Checklist
Applicant Checklist
Applicant Hire Checklist
Applicants' Checklist UK
Credentialing for Health Care
Domestic Loan Assgnmnt Chcklst
Domestic Loan Assgnmnt Chcklst
Foreign Loan Arrival Chcklst
Foreign Loan Departure Chcklst
Foreign Loan Host Checklist
Foreign Srvc Arrival Checklist
Foreign Srvc Departure Chklst
Foreign Srvc Host Checklist
Hire
Immunization Checklist
Local Co Govt New Hire Chcklst
Netherlands Monitor Absences
New Hire Checklist
Pre-Employment Checklist
Reptraition Checklist
Reptraition Checklist
Termination
Termination Checklist
Transfer
```

4. Click **Add the Relationship**. The Add Person Of Interest tab - Person Of Interest page (**Figure 16**) is displayed.

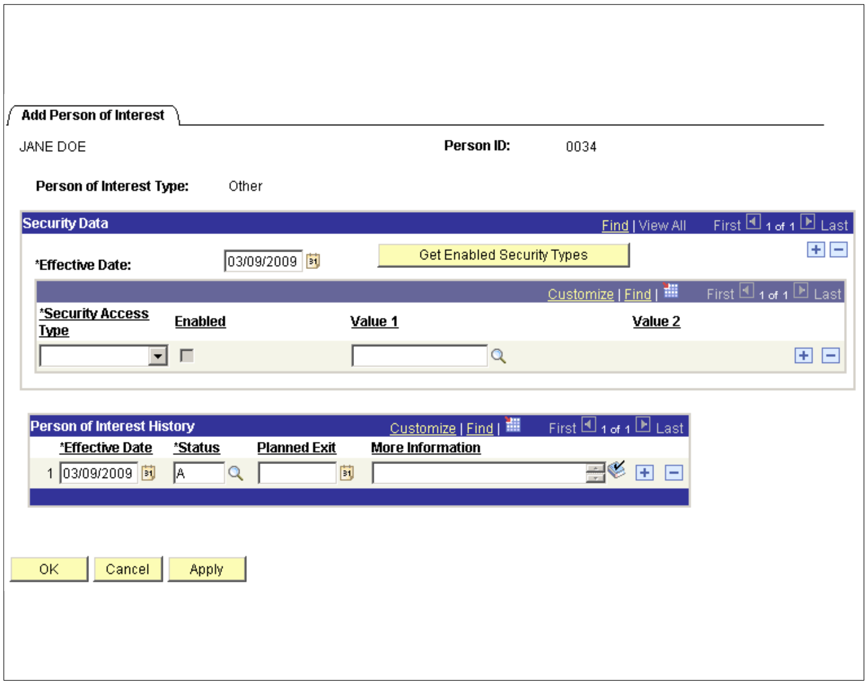

Figure 16. Add Person Of Interest tab - Person Of Interest page

5. Complete the fields as follows:

Person ID

This field is populated with the system-assigned ID when you are adding a new person. The value will display as `New` until the record is saved.

Person Of Interest Type

This field is populated based on the person of interest type selected on the Organizational Relationships tab - Add A Person page (**Figure 5**).

***Effective Date**

Enter the effective date or select a date by clicking on the calendar icon.

***Security Access Type**

Select the security access type from the drop-down list. Valid values are:

`Business Unit`

`Location`

`Institution`

OR

6. Click **Get Enabled Security Types**. All security access types are added and enabled.

Enabled

Check this box if applicable.

Value 1	Enter the value or select a value by clicking on the search icon. If the security access type **`Business Unit`** or **`Institution`** is selected, select the business unity or institution associated with this person for security purposes. If the security access type **`Location`** is selected, first select the appropriate business unit for the location's SetID in Security Key 1 and the location associated with this person for security purposes in Security Key 2.
Value 2	Enter the value or select a value by clicking on the search icon. If the security access type **`Business Unit`** or **`Institution`** is selected, select the business unity or institution associated with this person for security purposes. If the security access type **`Location`** is selected, first select the appropriate business unit for the location's SetID in Security Key 1 and the location associated with this person for security purposes in Security Key 2.
***Effective Date**	Enter the effective date or select a date by clicking the calendar icon.
***Status**	Enter the status or select a status by clicking on the search icon.
Planned Exit	Enter the planned exit date or select a date by clicking on the calendar icon.
More Information	Enter any additional information.

7. At this point the following options are available:

Step	Description
Click **OK**	To accept changes and return to the Add Person Of Interest tab - Person Of Interest page (**Figure 16**).
Click **Cancel**	To cancel action and return to the Add Person Of Interest tab - Person Of Interest page (**Figure 16**).
Click **Apply**	To apply changes and return to the Add Person Of Interest tab - Person Of Interest page (**Figure 16**).

Modify A Person

The Modify a Person component allows the user to modify information about a person.

This section contains the follwoing topics:

Modifying Biographical Details

Modifying Organizational Relationships

To modify a person:

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Biographical*** menu item.
4. Select the ***Modify A Person*** component. The Personal Data page - Find An Existing Value tab (**Figure 17**) is displayed.

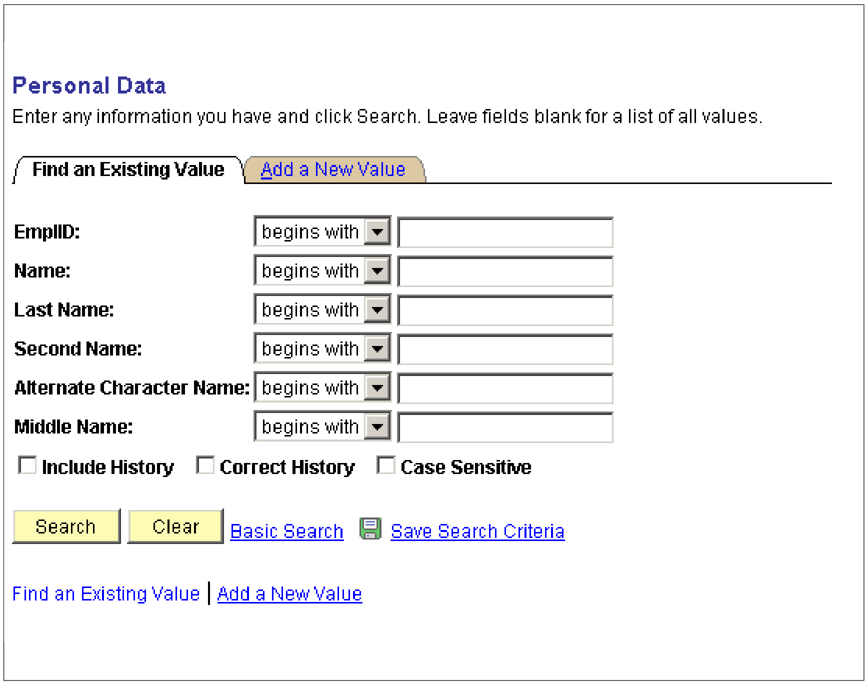

Figure 17. Personal Data page - Find An Existing Value tab

5. Complete the fields as follows:

EmplID	Enter the EmplID.
Name	Enter the first name.
Last Name	Enter the last name.

Second Name	Enter the middle name.
Alternate Character Name	Enter the the nickname.
Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

6. Click **Search** to search for the values entered.

   OR

   Click **Clear** to clear all entries.

7. Select the applicable value from the search results. The Biographical Details tab - Add A Person page (**Figure 2**) is displayed. Locate the field(s) to be modified and see field instructions in Add a person for the Biographical Details, Contact Information and Regional tabs for further information.

Modifying Biographical Details

This section contains the following topics:

Additional Names

Drivers License Data

Volunteer Activities

General Comments

Additional Names

The Additional Names component allows the user to maintain additional name types for a person.

To add an additional name:

1. Select the ***Workforce Administration*** menu group.

2. Select the ***Biographical*** menu.

3. Select the ***Additional Names*** component. The Find an Existing Value tab - Additional Names page (**Figure 18**) is displayed.

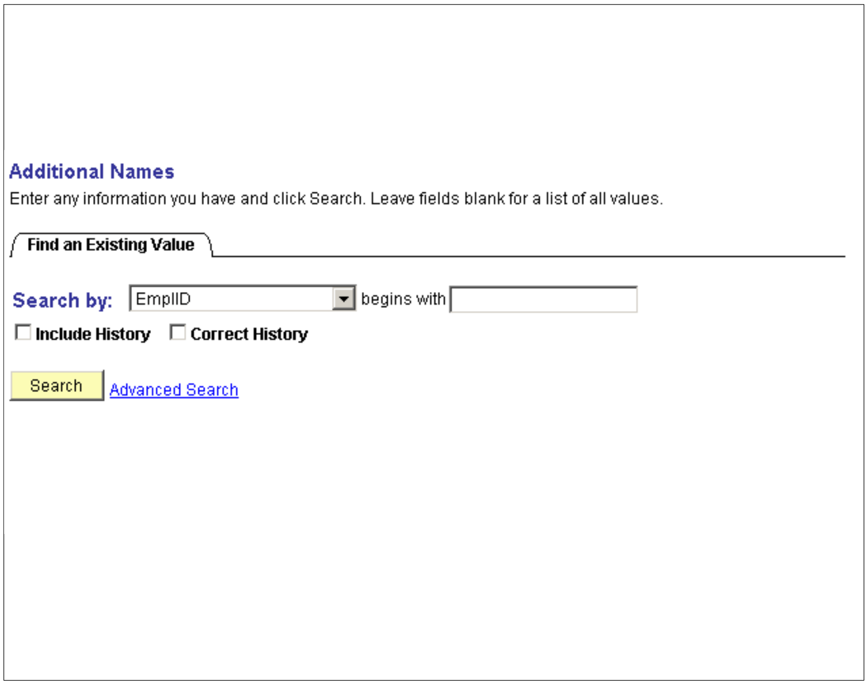

Figure 18. Find an Existing Value tab - Additional Names page

4. Complete the fields as follows:

Search by	Select the applicable value from the drop-down menu, then enter the appropriate The valid values are:
	Search By Valid Values
	`Alternate Character Name`
	`EmplID`
	`Last Name`
	`Middle Name`
	`Name`
	`Second Name`

Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

5. Click **Search**

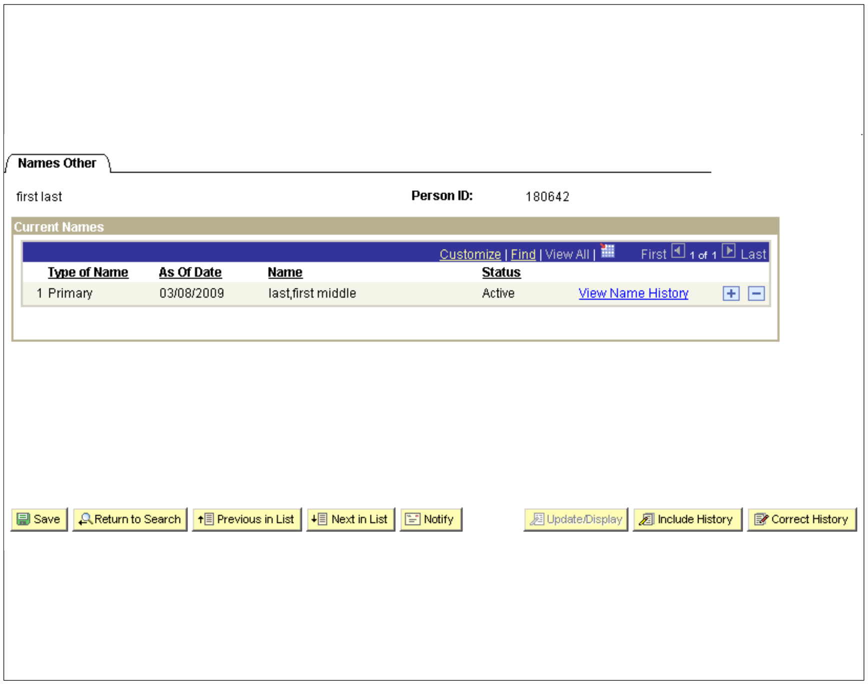

Figure 19.

6. Complete the fields as follows:

Person ID	This field is populated.
Type Of Name	This field is populated.
As Of Date	This field is populated.
Name	This field is populated.
Status	This field is populated

7. Click the ***View Name History*** link. The Name History page (**Figure 20**) is displayed.

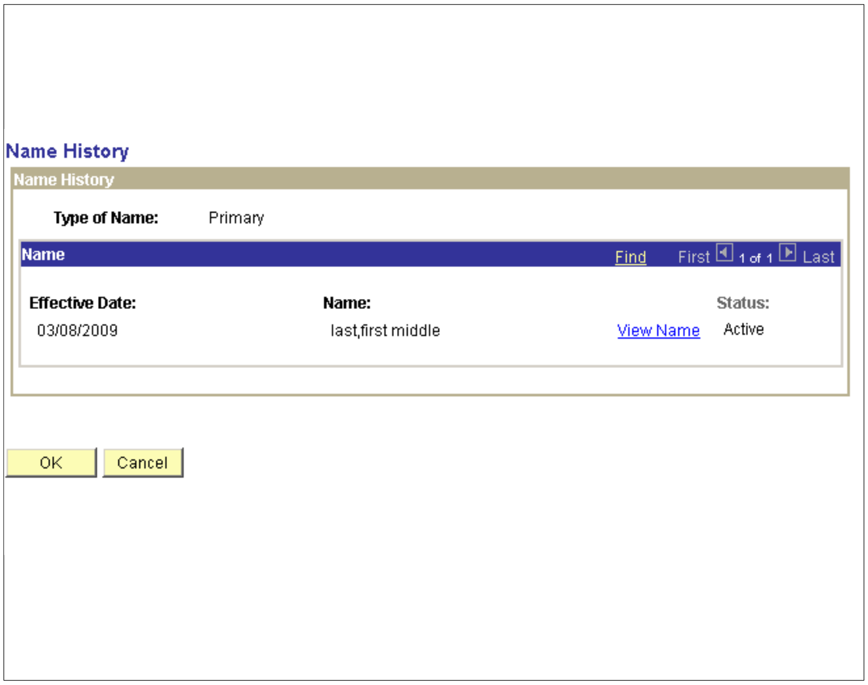

Figure 20. Name History page

8. Complete the fields as follows:

Type Of Name	This field is populated with the type of name.
Effective Date	This field is populated with the effective date.
Name	This field is populated with the full name of the employee.
Status	This field is populated with the status of the name.

9. Click the ***View Name*** link. The View Name page (**Figure 21**) is displayed.

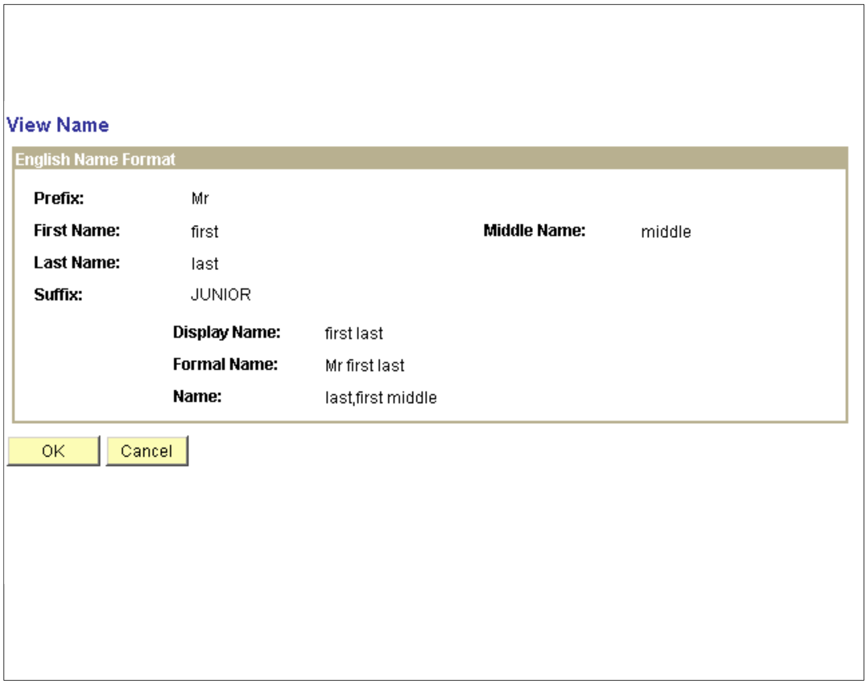

Figure 21. View Name page

10. Complete the fields as follows:

Prefix	This field is populated with the prefix of the employees name.
First Name	This field is populated with the first name of the employee.
Middle Name	This field is populated with the middle name of the employee.
Last Name	This field is populated with the last name of the employee.
Suffix	This field is populated with the suffix of the employees name.
Display Name	This field is populated with the employees first and last name.
Formal Name	This field is populated with the prefix and the first and last name of the employee.

Name	This field is populated with the first, middle, and last name of the employee.

11. Click **OK**.

OR

Click **Cancel**.

12. At this point the following options are available:

Step	Description
Click **Save**.	
Click **Return To Search**.	
Click **Previous In List**.	
Click **Next In List**.	
Click **Notify**.	
Click **Previous Tab**.	
Click **Include History**.	
Click **Correct History**.	

Driver's License Data

The Driver's License Data component allows the user to identify diriver's license information.

To enter driver's license data:

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Biographical*** menu.
3. Select the ***Driver's License Data*** component. The Find an Existing Value tab - Identification Data page (**Figure 22**) is displayed.

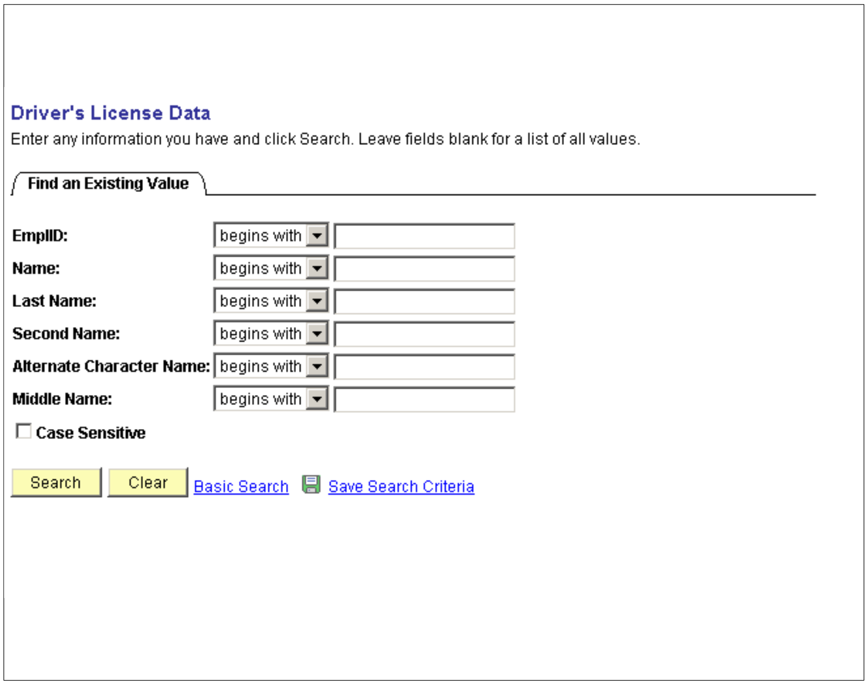

Figure 22. Find an Existing Value tab - Driver's License Data page

4. Complete the fields as follows:

EmplID	Enter the EmplID.
Name	Enter the first name.
Last Name	Enter the last name.
Second Name	Enter the second name.
Alternate Character Name	Enter the the nickname.
Middle Name	Enter the middle name.
Case Sensitive	Check this box if applicable.

5. Click **Search** to search for the values entered.

OR

Click **Clear** to clear all entries.

6. Select the applicable value from the search results. The Drivers License tab - Driver's License Data page (**Figure 23**) is displayed.

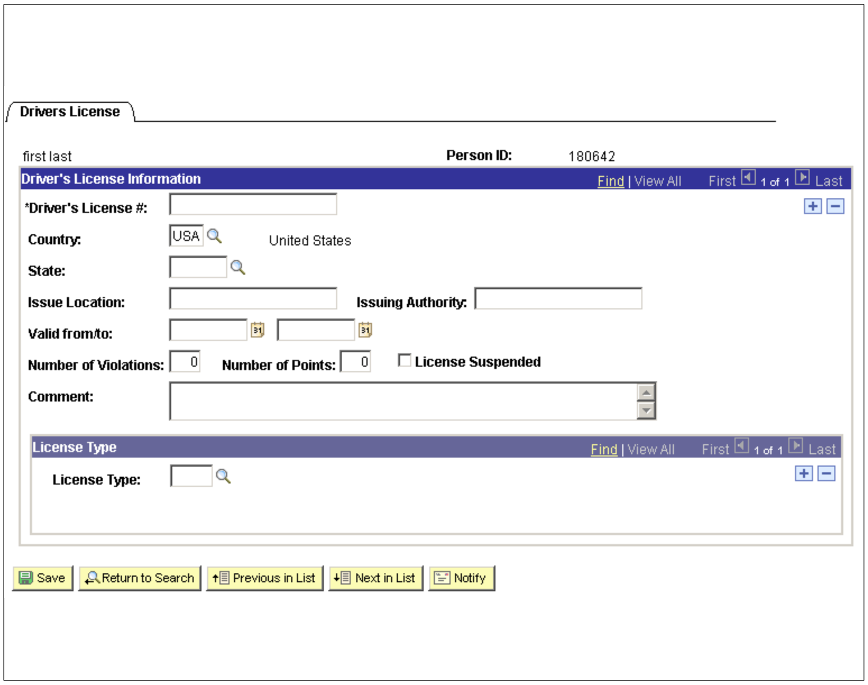

Figure 23. Drivers License tab - Drivers License Data page

7. Complete the fields as follows:

Name	This field is populated with the employees name.
Person ID	This field is populated with person ID assigned to the employee.
***Driver's Liscense #**	Enter the driver's liscense number.
Country	Enter the country the driver's liscense was issued or select a country by clicking the search icon. The full name of the entry or selection is displayed to the right of the field.
State	Enter the state in which the driver's liscense was issued or select a state by clicking the search icon.
Issue Location	Enter the location the driver's license was issued.
Issuing Authority	Enter the issuing authority.
Valid From/To	Enter the dates the driver's license is valid from and to or select the dates by clicking the calendar icon.

Number Of Violations	Enter the number of violations.
Number Of Points	Enter the number of points.
License Suspended	Check this box if the employee's license has ever been suspended.
Comment	Enter any applicable comments.
License Type	Enter the type of license or select a type by clicking the search icon.

8. At this point the following options are available:

Step	Description
Click **Save**	
Click **Return To Search**	
Click **Previous In List**	
Click **Next In List**	
Click **Notify**	

Volunteer Activities

The Volunteer Activities component allows the user to identify a person's participation in volunteer programs.

To enter volunteer activities:

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Security Clearance*** component. The Find an Existing Value tab - Volunteer Activities page (**Figure 24**) is displayed.

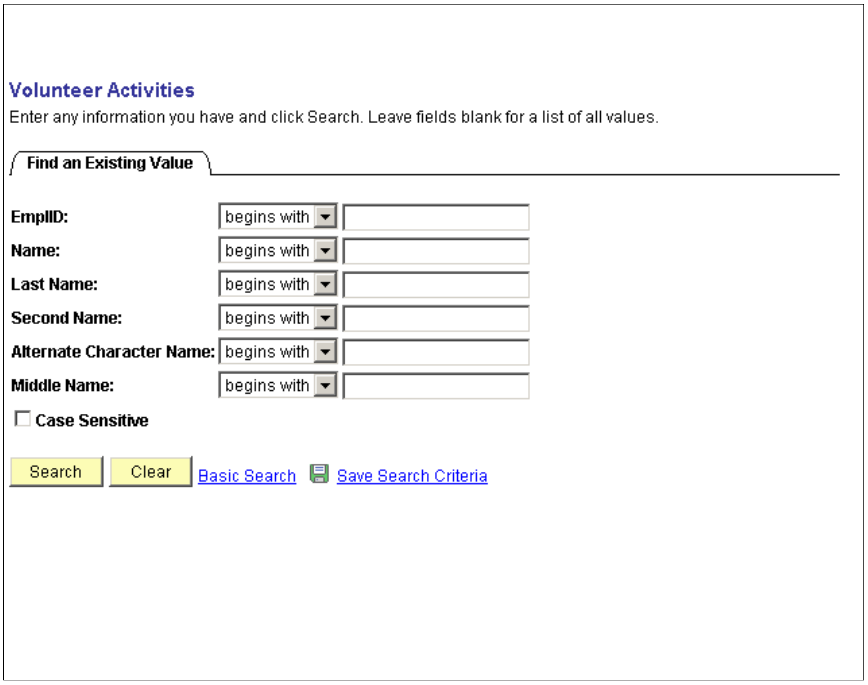

Figure 24. Find an Existing Value tab - Volunteer Activities page

4. Complete the fields as follows:

EmplID	Enter the EmplID.
Empl Rcd Nbr	Enter the employee record number.
Name	Enter the name.
Last Name	Enter the last name.
Second Name	Enter the middle name.
Alternate Character Name	Enter the the nickname.
Middle Name	Enter the middle name.
Case Sensitive	Check this box if applicable.

5. Click **Search** to search for the values entered.

OR

Click **Clear** to clear all entries.

6. Select the applicable value from the search results. The Volunteer activities tab - Volunteer Activities page (**Figure 25**) is displayed.

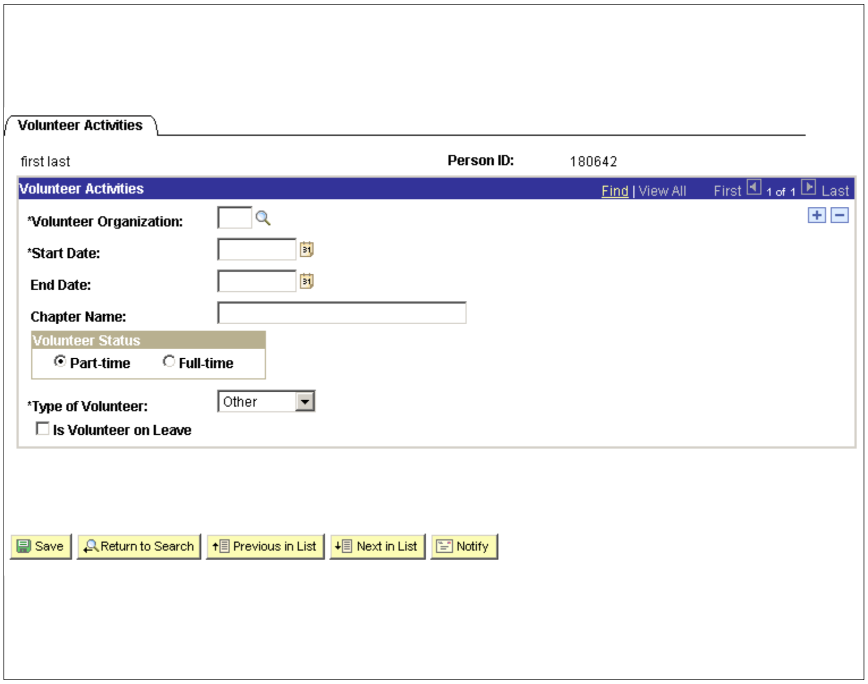

Figure 25. Voluntee Activities tab - Volunteer Activities page

7. Complete the fields as follows:

Person ID	This field is populated.
Volunteer Organization	Enter the volunteer organization or select an organization by clicking on the search icon.
Start Date	Check this box if applicable.
End Date	Select a status from the drop-down menu. The valid values are **`Active`** and **`Inactive`**.
Chapter Name	Enter the chapter name.
Volunteer Status	Select the applicable value, **`Part-time`** or **`Full-time`**.

Type of Volunteer	Select the applicable type of volunteer. The valid values are:
	Volunteer Type Valid Values
	`Administr`
	`Canvassar`
	`Executive`
	`Fund Raise`
	`Other`

Is Volunteer on Leave	Check this box if applicable.

8. At this point the following options are available:

Step	Description
Click **Save**	
Click **Return To Search**	
Click **Previous In List**	
Click **Next In List**	
Click **Notify**	

General Comments

The General Comments component allow the user to enter comments about a person.

To enter general comments:

1. Select the ***Workforce Administration*** menu group.

2. Select the ***Biographical*** menu.

3. Select the ***General Comments*** component. The Find an Existing Value tab - General Comments page (**Figure 26**) is displayed.

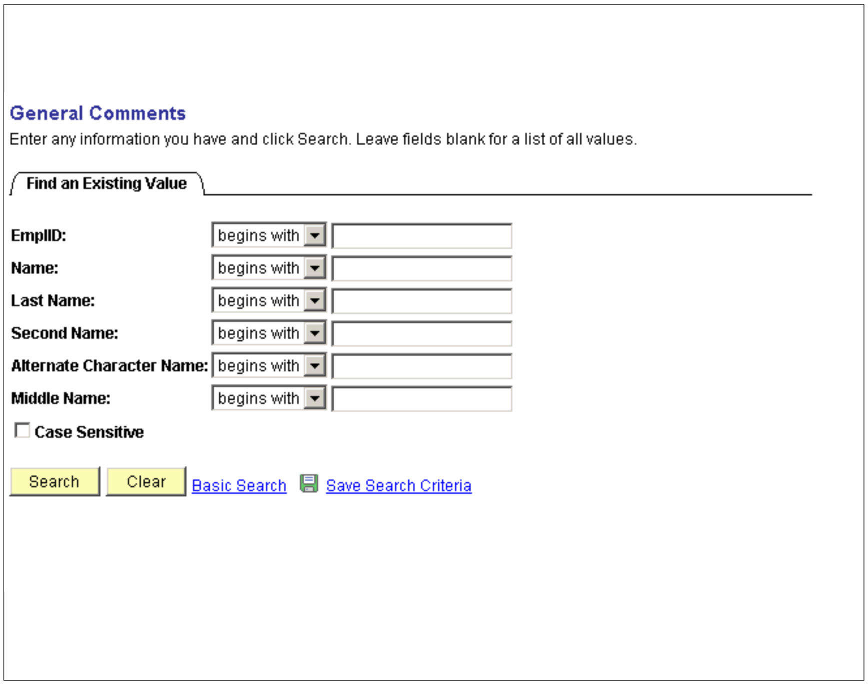

Figure 26. Find an Existing Value tab - General Comments page

4. Complete the fields as follows:

EmplID	Enter the EmplID.
Name	Enter the first name.
Last Name	Enter the last name.
Second Name	Enter the second name.
Alternate Character Name	Enter the the nickname.
Middle Name	Enter the middle name.
Case Sensitive	Check this box if applicable.

5. Click **Search** to search for the values entered.

OR

Click **Clear** to clear all entries.

6. Select the applicable value from the search results. The General Comments tab - General Comments page (**Figure 27**) is displayed.

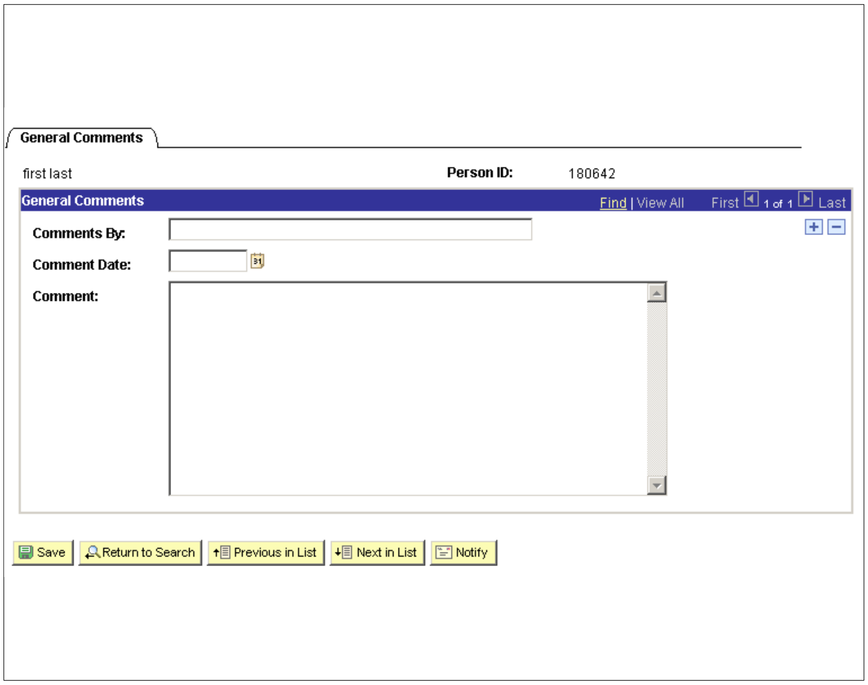

Figure 27. General Comments tab - General Comments page

7. Complete the fields as follows:

Name	This field is populated with the employees name.
Person ID	This field is populated with person ID assigned to the employee.
Comments By	Enter the name of the person entering the comments.
Comment Date	Enter the comment date or select a date by clicking the calendar icon.
Comment	Enter the comments.

8. At this point the following options are available:

Step	Description
Click **Save**	
Click **Return To Search**	
Click **Previous In List**	
Click **Next In List**	
Click **Notify**	

Modifying Organizational Relationships

This section contains the following topics:

New Employment Instance USF

New Contingent Worker Instance

Prior Work Experience

Job Data

Add a POI Relationship

Person Checklist

New Employment Instance USF

The New Employment Instance USF component allows the user to create a new employee instance along with the job data for the employee. This will also create a new Employee Record Number.

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Organizational Relationships*** menu item.
4. Select the ***New Employment Instance USF*** component. The New Employment Instance tab page (**Figure 28**) is displayed.

Figure 28. New Employment Instance tab page

5. Complete the fields as follows:

Person ID	Enter the Person ID or select a person by clicking the search icon.

6. Click the ***Add The Relationship*** link. The Data Control tab - Add Employee page (**Figure 6**) is displayed. For more information on PAR Processing, refer to Chapter 17, Section 5.

OR

Click the ***Search For Matching Persons*** link. The Search/Match page (**Figure 29**) is displayed.

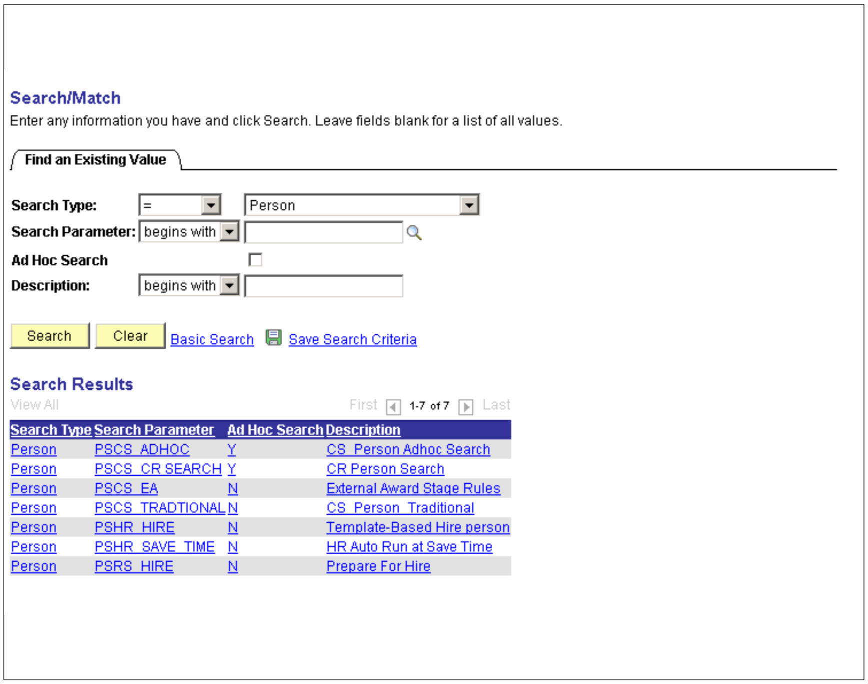

Figure 29. Search/Match page

7. Complete the fields as follows:

Search Type	Select the type of search from the drop-down menu. Valid values are **`Applicant`**, **`Organization`**, or **`Person`**.
Search Parameter	Enter the search parameter or select a parameter by clicking the search icon.
Ad Hoc Search	Check this box if applicable.
Description	Enter the description.

8. Click **Search**. Select the applicable value from the search results. The Search Criteria page is displayed (**Figure 84**). See Search for Matching Persons for more information.

New Contingent Worker Instance

The New Contingent Worker Instance component allows the user to create a new contingent worker instance along with the job data for the person. This will also create a new employee record number.

1. Select the ***Workforce Administration*** menu group.

2. Select the ***Personal Information*** menu.

3. Select the ***Organizational Relationships*** menu item.

4. Select the ***New Contingent Worker Instance*** component. The Add Contingent worker Instance page - Add A New value tab (**Figure 30**) is displayed.

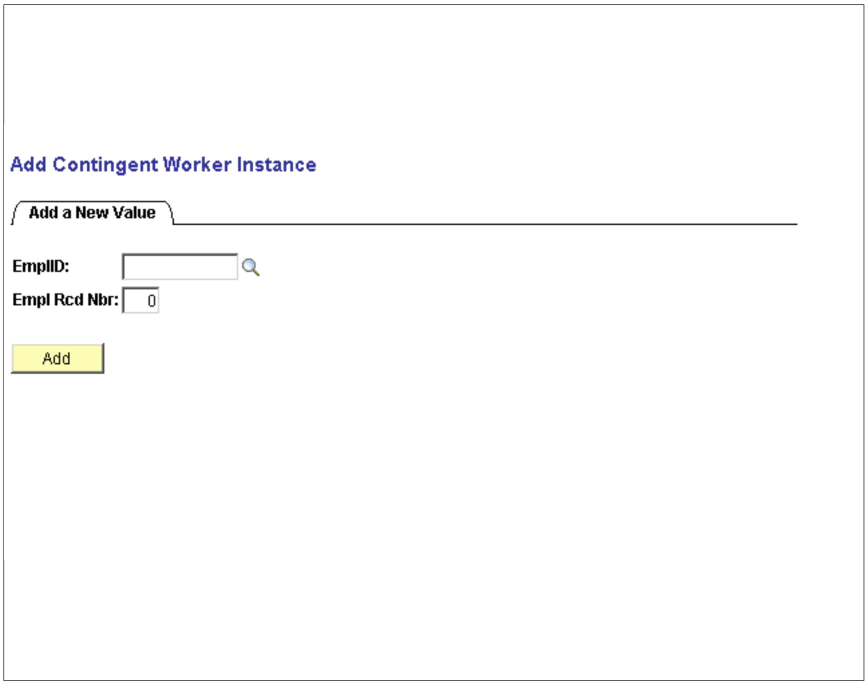

Figure 30. Add Contingent Worker Instance page - Add A New Value tab

5. Complete the fields as follows:

EmplID	Enter the EmplID or select an ID by clicking the search icon.
Empl Rcd Nbr	Enter the Employee Record Number.

6. Click **Add**. The Work Location tab - Contingent Worker page (**Figure 7**) is displayed. See Add Contingent Worker for more information.

Prior Work Experience

The Prior Work Experience allows the user to enter a person's previous work experience.

To enter prior work experience:

1. Select the ***Workforce Administration*** menu group.

2. Select the ***Personal Information*** menu.

3. Select the ***Biographical*** menu item.

4. Select the ***Prior Work Experience*** component. The Find an Existing Value tab - Prior Work Experience page (**Figure 31**) is displayed.

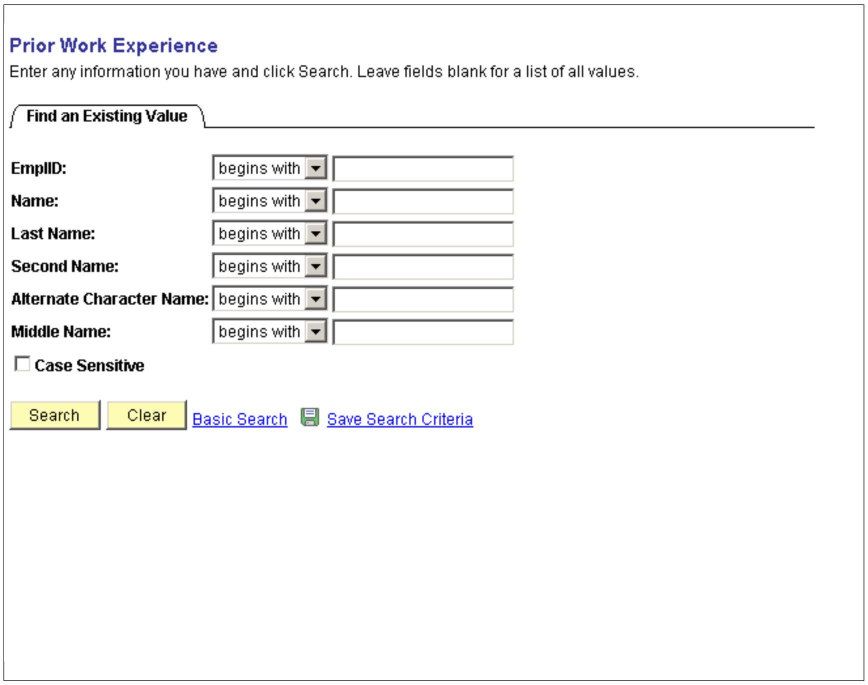

Figure 31. Find an Existing Value tab - Prior Work Experience page

5. Complete the fields as follows:

EmplID	Enter the EmplID.
Empl Rcd Nbr	Enter the employee record number.
Name	Enter the name.
Last Name	Enter the last name.
Second Name	Enter the middle name.
Alternate Character Name	Enter the the nickname.
Middle Name	Enter the middle name.
Case Sensitive	Check this box if applicable.

6. Click **Search** to search for the values entered.

OR

Click **Clear** to clear all entries.

7. Select the applicable value from the search results. The Prior Work Experience tab - Prior Work Experience page (**Figure 32**) is displayed.

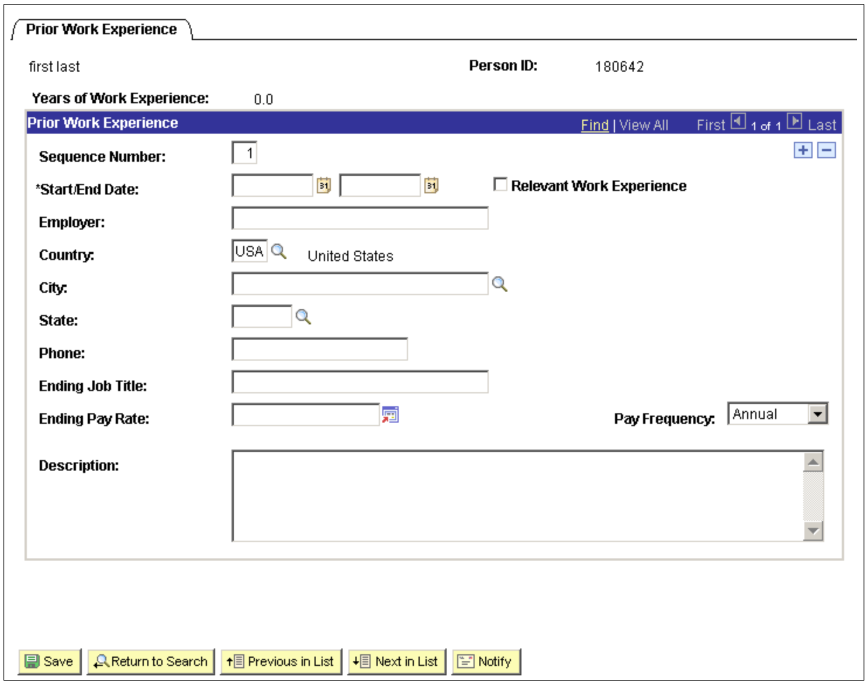

Figure 32. Prior Work Experience tab - Prior Work Experience page

8. Complete the fields as follows:

Name	This field is populated with the employees name.
Person ID	This field is populated with person ID assigned to the employee.
Years Of Work Experience	This field is populated.
Sequence Number	Enter the sequence number.
***Start/End Date**	Enter the start/end date of the work experience or select the dates by clicking on the calendar icon.
Relevant Work Experience	Check this box if applicable.

Employer	Enter the employer.
Country	enter the country.
City	Enter the city or select a city by clicking on the search icon.
State	Enter the state of select a state by clicking on the search icon.
Phone	Enter the phone number.
Ending Job Title	Enter the last job title held.
Ending Pay Rate	Etner the ending pay rate or select a pay rate by clicking the currency icon.

Pay Frequency	Select the pay frequency from the drop-down menu. The valid values are:
	Pay Frequency Valid Values
	`Annual`
	`Bi-weekly`
	`Fee Basis`
	`Hour`
	`Month`
	`Per Day`
	`Per Diem`
	`Per Hour`
	`Per Month`
	`W/O Comp`
	`Year`

Description	Enter the description of the work experience gained.

9. At this point the following options are available:

Step	Description
Click **Save**	
Click **Return To Search**	
Click **Previous In List**	

Step	Description
Click **Next In List**	
Click **Notify**	

Job Data

The Job Data component allows the user view and modify job data for Contingent Workers and POIs with jobs only.

To view/modify job data:

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Job Information*** menu.
3. Select the ***Job Data*** component. The Find An Existing value tab - Job Data page (**Figure 33**) is displayed.

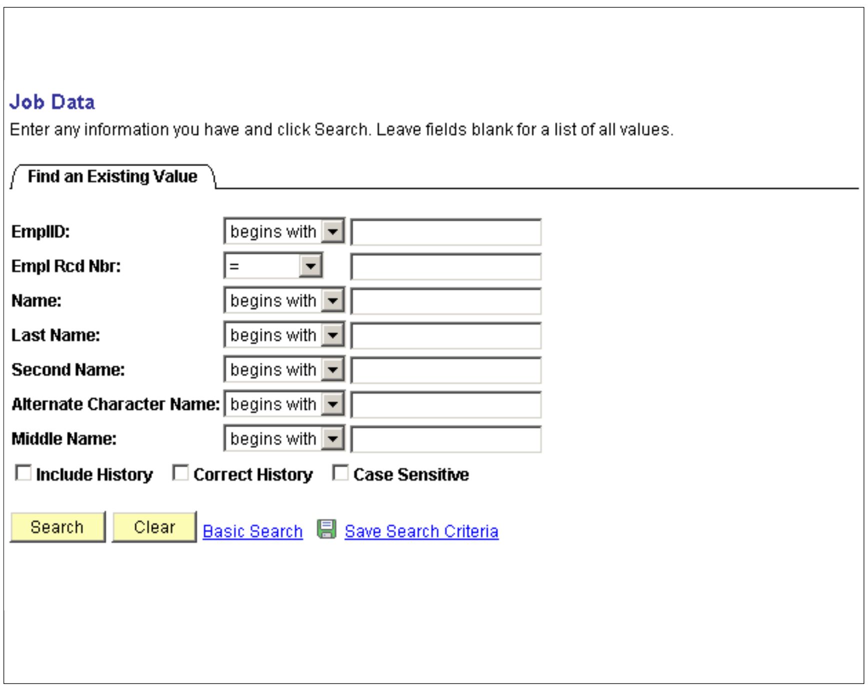

Figure 33. Find An Existing Value tab - Job Data page

4. Complete the fields as follows:

EmplID	Enter the EmplID.
Empl Rcd Nbr	Enter the employee record number.
Name	Enter the name.

Last Name	Enter the last name.
Second Name	Enter the middle name.
Alternate Character Name	Enter the the nickname.
Middle Name	Enter the middle name.
Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

5. Click **Search** to search for the values entered. The Work Location tab - ???? page (**Figure 34**) is displayed.

OR

Click **Clear** to clear all entries.

6. Locate the field(s) to be modified and see field instructions in Add an Employee, Add a Contingent Worker or POI with job data for further information.

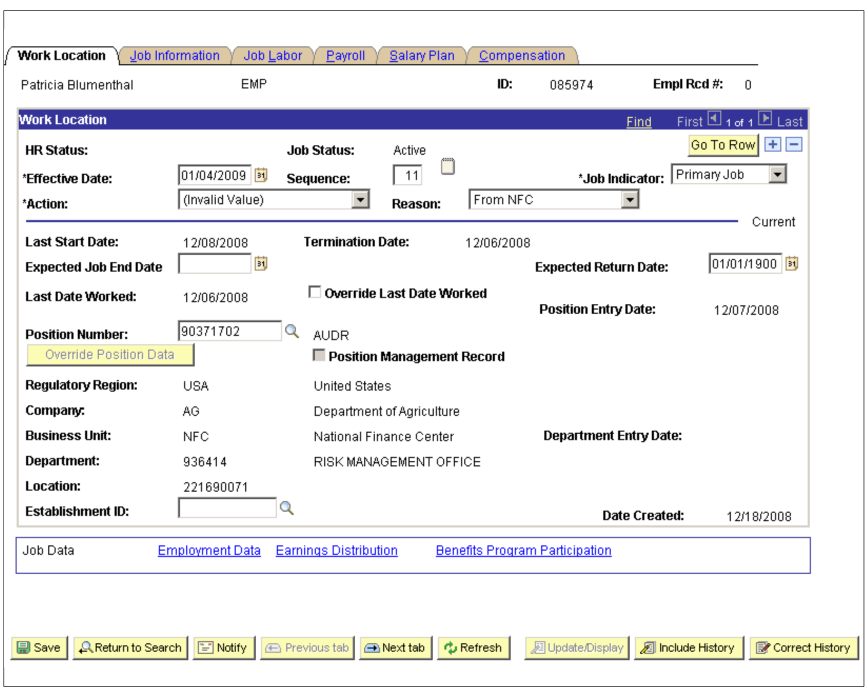

Figure 34. Work Location tab - Job Data page

Add A POI Relationship

This component will create a new POI instance with or without job data for the employee. This will also create a new Employee Record Number.

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Organizational Relationships*** menu item.
4. Select the ***Add A POI Relationship*** component. The Add New POI Type page - Add A New value tab (**Figure 35**) is displayed.

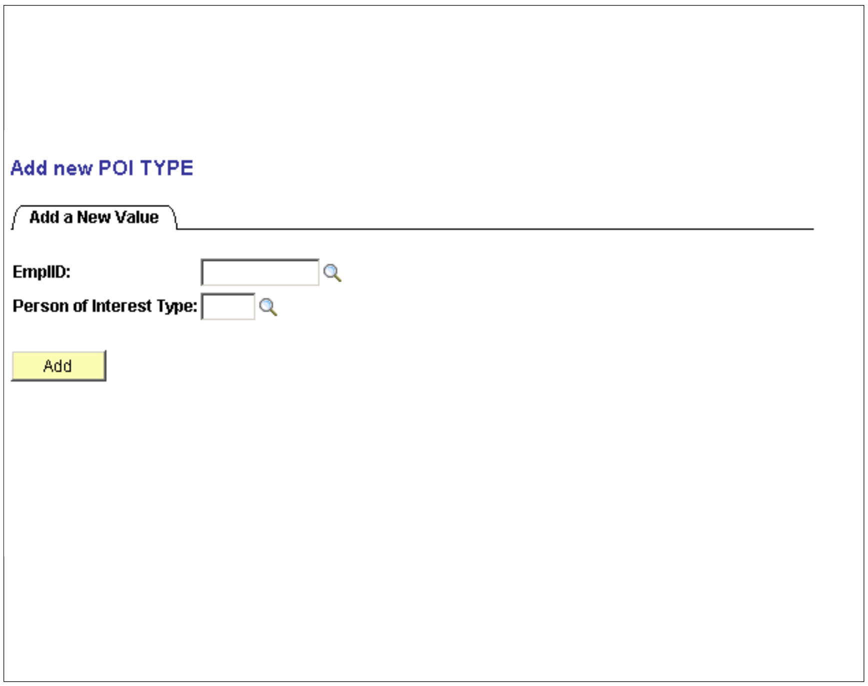

Figure 36. Add New POI Type page - Add A New Value tab

5. Complete the fields as follows:

EmplID	Enter the EmplID or select an ID by clicking the search icon.
Person Of Interest Type	Enter the Person of Interest type or select a type by clicking the search icon.

6. Click **Add**. The Add Person Of Interest tab - Person Of Interest page (**Figure 16**) is displayed. See Adding A Person Of Interest for more information.

Company Property

1. Select the ***Workforce Administration*** menu group.

2. Select the ***Job Information*** menu.

3. Select the ***Company Property*** component. The Find an Existing Value tab - Company Propery page (**Figure 24**) is displayed.

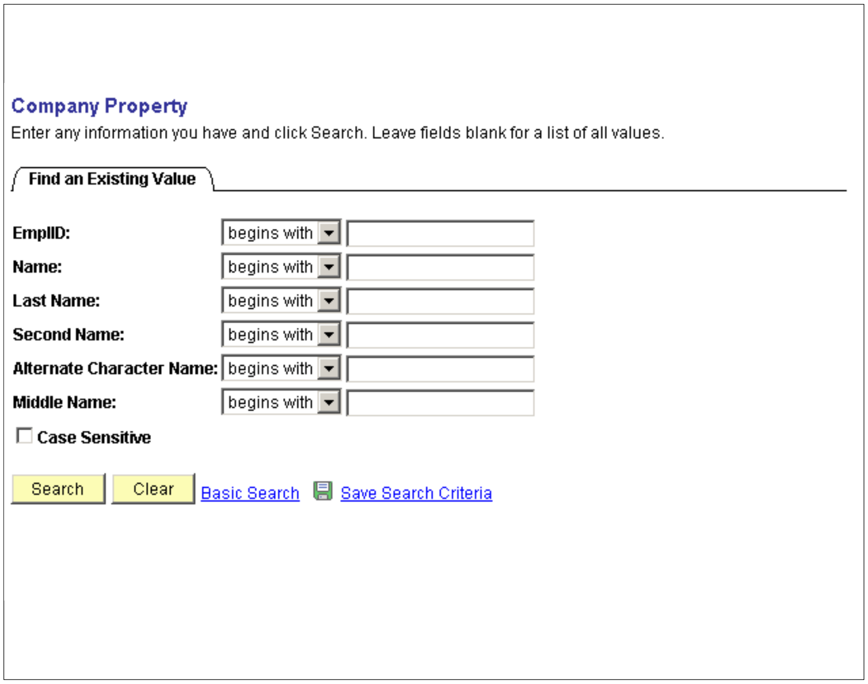

Figure 37. Find an Existing Value tab - Company Property page

4. Complete the fields as follows:

EmplID	Enter the EmplID.
Name	Enter the name.
Last Name	Enter the last name.
Second Name	Enter the middle name.
Alternate Character Name	Enter the the nickname.
Middle Name	Enter the middle name.
Case Sensitive	Check this box if applicable.

5. Click **Search** to search for the values entered.

OR

Click **Clear** to clear all entries.

6. Select the applicable value from the search results. The Company Property tab - Company Property page (**Figure 25**) is displayed.

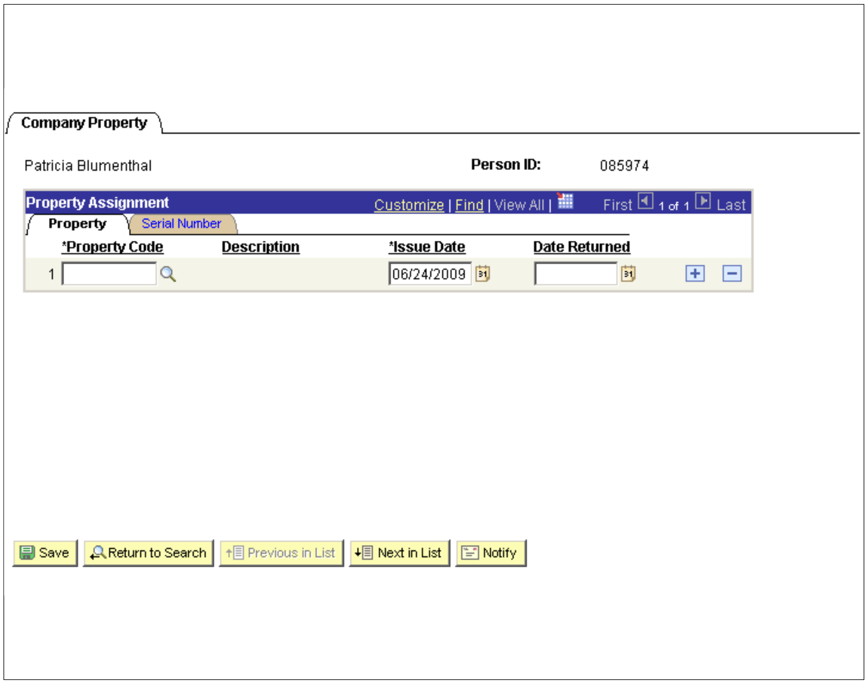

Figure 38. Company Property tab - Company Property page

7. Complete the fields as follows:

Person ID	This field is populated.
Property Code	Enter the property code or select a code by clicking the search icon.
Description	
Issue Date	Enter the issue date or select a date by clicking on the calendar icon.
Date Returned	Enter the date returned or select a date by clicking on the calendar icon.

8. Click the ***Serial Number*** tab. the Company Property, Serial Number tab - Company Property page (**Figure 39**) is displayed.

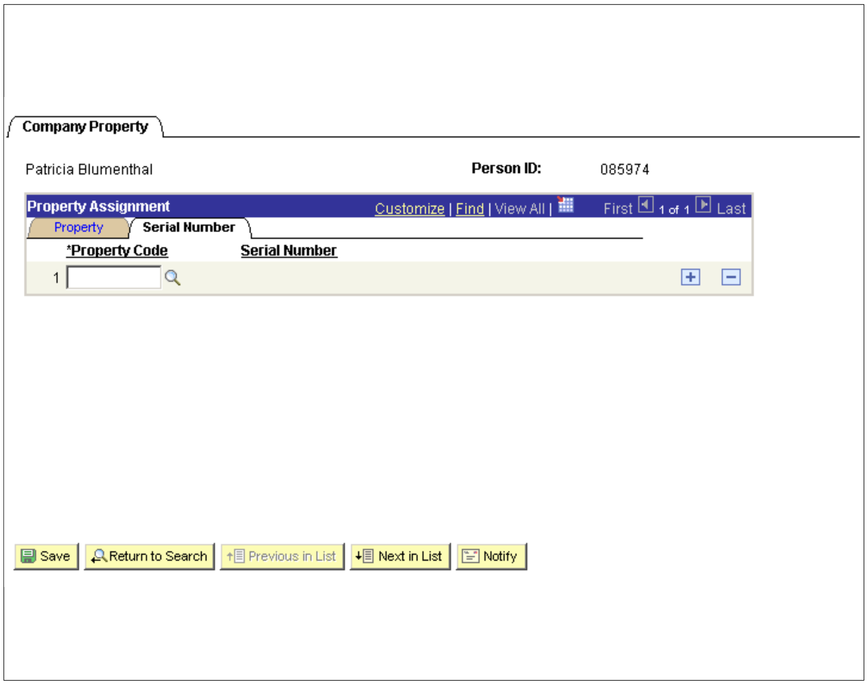

Figure 39. Company Property, Serial Number tab - Company Property page

9. Complete the fields as follows:

Person ID	This field is populated.
Property Code	Enter the property code or select a code by clicking the search icon.
Serial Number	

Person Checklist

A checklist is a list of additional components that need to be completed for a person. The Person Checklist allows the user to select and create a checklist for themselves. When the user selects a checklist code for a person and creates a relationship, the application also creates a record in the Person Checklist component. A person can have multiple checklists either at the same time or over time.

Adding A Disability

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Disability*** menu.
3. Select the ***Disabilities*** component. The Find An Existing Value tab - Disabilities page (**Figure 40**) is displayed.

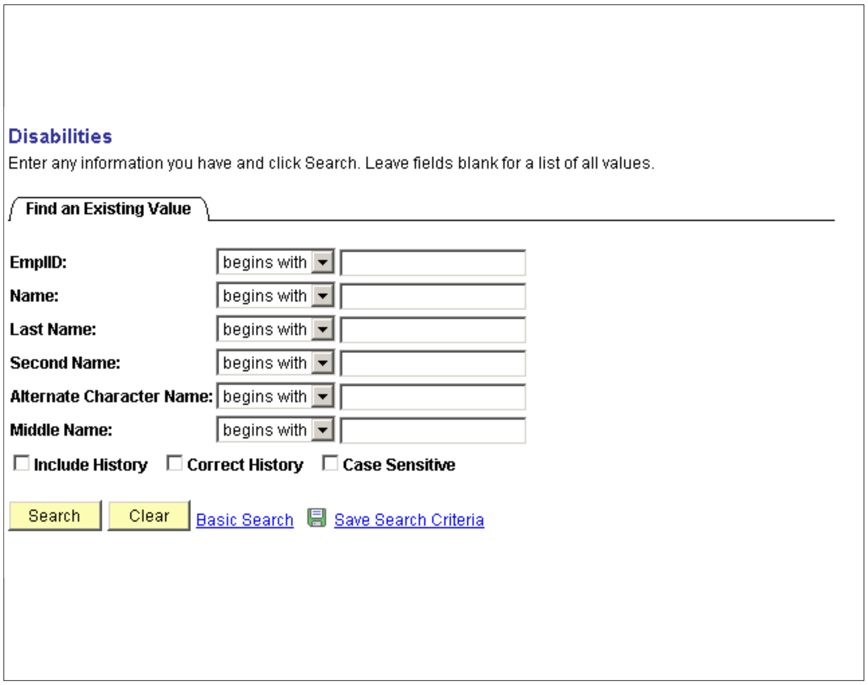

Figure 40. Find An Existing Value tab - Disabilities page

4. Complete the fields as follows:

EmplID	Enter the EmplID.
Name	Enter the first name.
Last Name	Enter the last name.
Second Name	Enter the second name.
Alternate Character Name	Enter the nickname if applicable.
Middle Name	Enter the middle name.

Include History	Check this box if applicable
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

5. Click **Search**. The Disability tab - Disabilities page (**Figure 41**) is displayed.

   OR

   Click **Clear** to clear the entry.

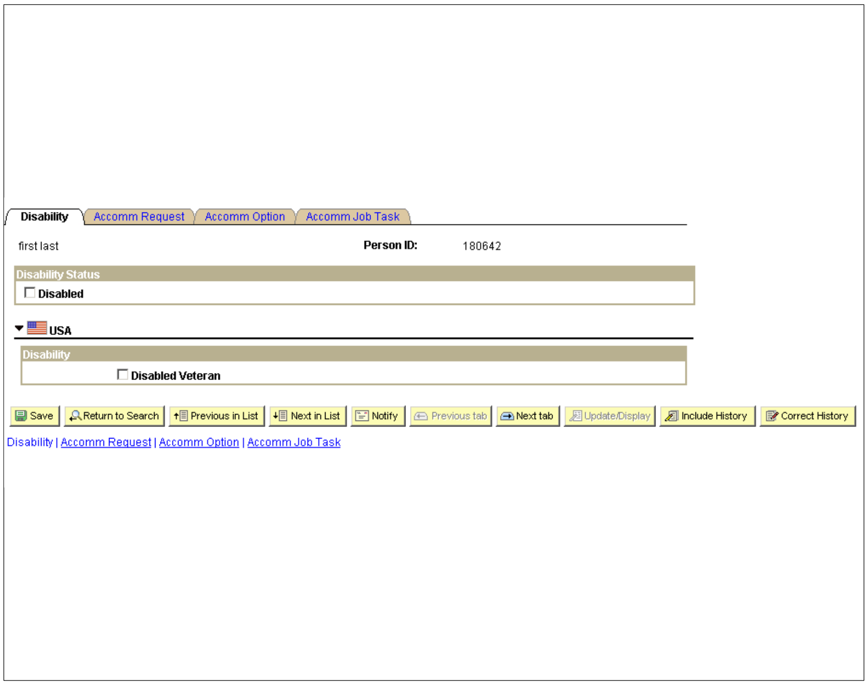

Figure 41. Disability tab - Disabilities page

6. Complete the fields as follows:

Name	This field is populated with the name of the person.
Person ID	This field is populated with the person ID.
Disability Status/Disabled	Check this box if applicable
Disability/Disabled Veteran	Check this box if applicable.

7. Click the ***Accomm Request*** tab. The Accomm Request tab - Disabilities page (**Figure 42**) is displayed.

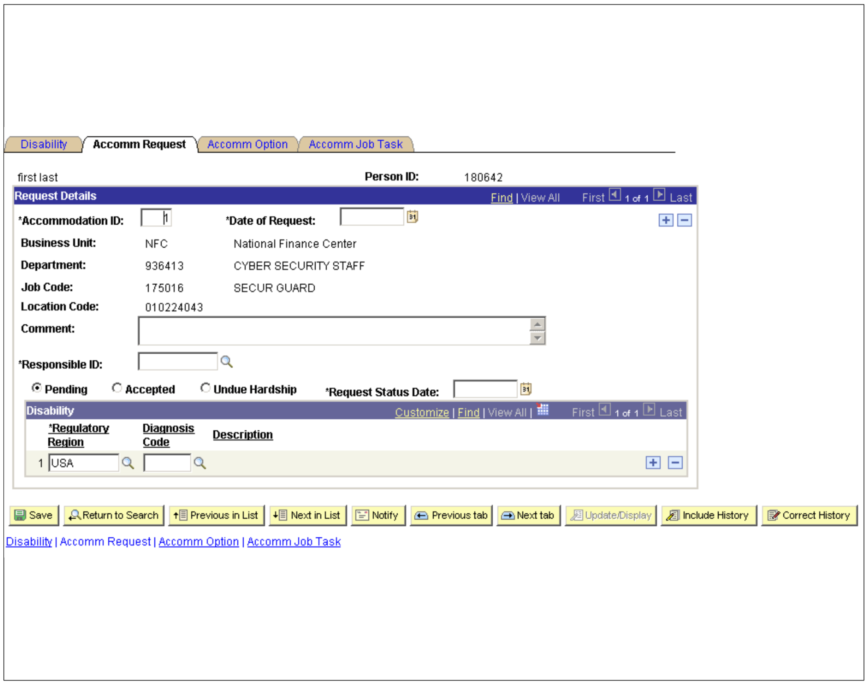

Figure 42. Accomm Request tab - Disabilities page

8. Complete the fields as follows:

Name	This field is populated with the name of the person.
Person ID	This field is populated with the person ID.
***Accomodation ID**	Enter the accomodation ID
***Date of Request**	Enter the date of the request or select a date by clicking the calendar icon.
Business Unit	This field is populated.
Department	This field is populated with the department number and name.
Job Code	This field is populated with the job code number and name.
Location Code	This field is populated with the location code.
Comment	Enter any applicable comments.

***Responsible ID**	Enter the responsible ID or select and ID by clicking on the search icon.
Pending	Select this option if applicable.
Accepted	Select this option if applicable.
Undue Hardship	Select this option if applicable.
***Request Status Date**	Enter the request status date or select a date by clicking the calendar icon.
***Regulatory Region**	Enter the regulatory region or select a region by clicking the search icon.
Diagnosis Code	Enter the diagnosis code or select a code by clicking the search icon.
Description	This field is populated based on the regulatory region and diagnosis code entered or selected in the previous fields.

9. Click the ***Accomm Option*** tab. The Accomm Option tab - Disabilities page (**Figure 43**) is displayed.

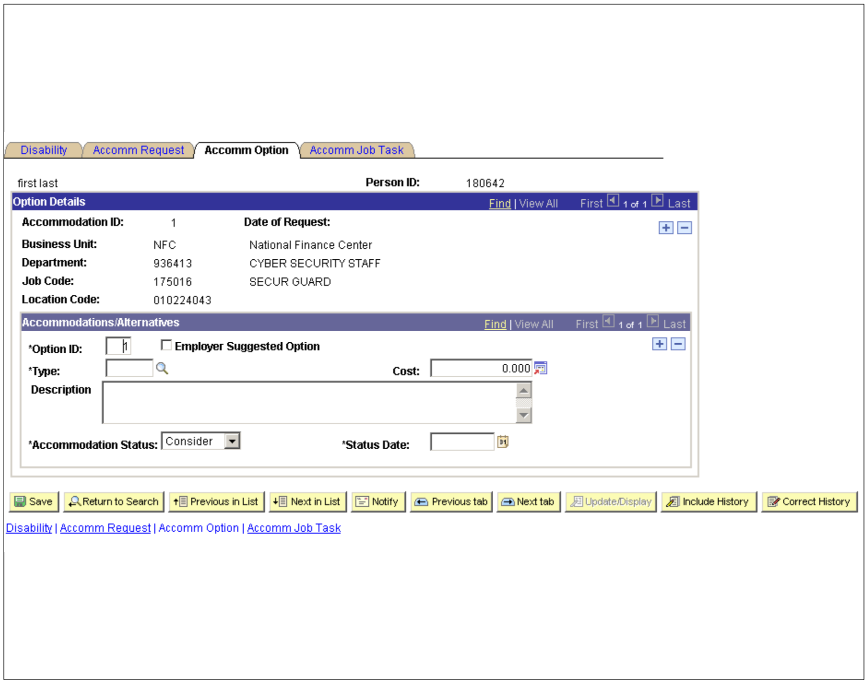

Figure 43. Accomm Option tab - Disabilities page

10. Complete the fields as follows:

Name	This field is populated with the name of the person.
Person ID	This field is populated with the person ID.
Accomodation ID	This field is populated based on the accomodation ID entered on the The Accomm Request tab - Disabilities page (**Figure 42**).
Date of Request	This field is populated based on the accomodation ID entered on the The Accomm Request tab - Disabilities page (**Figure 42**).
Business Unit	This field is populated with the business unit and name.
Department	This field is populated with the department number and name.
Job Code	This field is populated with the job code number and name.
Location Code	This field is populated with the location code.
Comment	Enter any applicable comments.
***Option ID**	Enter the option ID.
Employer Suggested Option	Check this box if applicable.
***Type**	Enter the type or select a type by clicking the search icon.
Cost	Enter the cost or select a cost by clicking the currency icon.

***Accomodation Status**	Select an accomodation status from the drop-down list. The valid values are:
	Accomodation Status Valid Values
	`Accepted`
	`Approved`
	`Consider`
	`Hardship`
	`Offered`
	`Rejected`

***Status Date**	Enter the status date or select a date by clicking the calendar icon.

11. Click the ***Accomm Job Task*** tab. The Accomm Job Task tab - Disabilities page (**Figure 44**) is displayed.

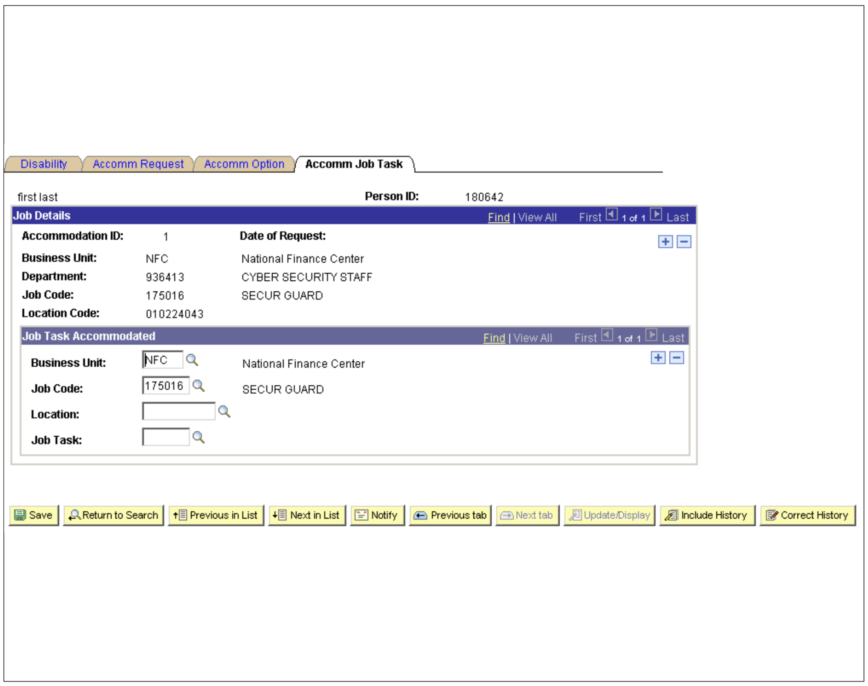

Figure 44. Accomm Job Task tab - Disabilities page

12. Complete the fields as follows:

Name	This field is populated with the name of the person.
Person ID	This field is populated with the person ID.

Accomodation ID	This field is populated based on the accomodation ID entered on the The Accomm Request tab - Disabilities page (**Figure 42**).
Date of Request	This field is populated based on the accomodation ID entered on the The Accomm Request tab - Disabilities page (**Figure 42**).
Business Unit	This field is populated with the business unit and name.
Department	This field is populated with the department number and name.
Job Code	This field is populated with the job code number and name.
Location Code	This field is populated with the location code.
Job Task Accommodated/ Business Unit	Enter the business unit or select a unit by clicking the search icon. The name is displayed after the entry or selection is made.
Job Task Accommodated/Job Code	Enter the job code or select a code by clicking the search icon. The name is displayed after the entry or selection is made.
Job Task Accommodated/Location	Enter the location or select a location by clicking the search icon. The name is displayed after the entry or selection is made.
Job Task Accommodated/Job Task	Enter the job task or select a task by clicking the search icon. The name is displayed after the entry or selection is made.

13. At this point the following options are available:

Step	Description
Click **Save**.	
Click **Return To Search**.	
Click **Previous In List**.	
Click **Next In List**.	
Click **Notify**.	

Step	Description
Click **Previous Tab**.	
Click **Include History**.	
Click **Correct History**.	

Adding Identification Data

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Citizenship*** menu item.
4. Select the ***Identification Data*** component. The Find an Existing Value tab - Identification Data page (**Figure 54**) is displayed.

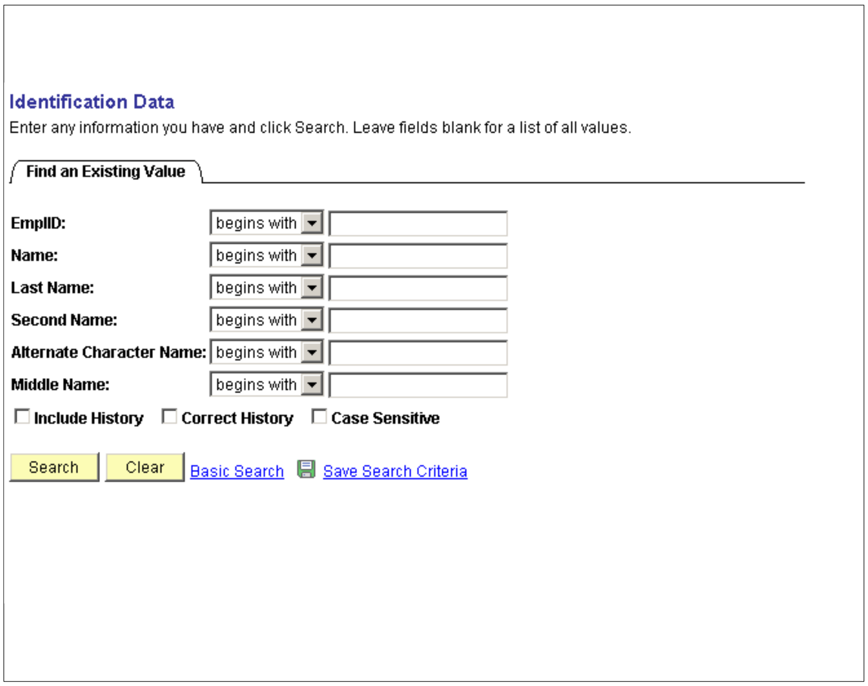

Figure 45. Find an Existing Value tab - Identification Data page

5. Complete the fields as follows:

EmplID	Enter the EmplID.
Name	Enter the first name.
Last Name	Enter the last name.
Second Name	Enter the second name.
Alternate Character Name	Enter the the nickname.

Middle Name	Enter the middle name.
Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

6. Click **Search** to search for the values entered.

   OR

   Click **Clear** to clear all entries.

7. Select the applicable value from the search results. The Citizenship/Passport tab - Identification Data page (**Figure 46**) is displayed.

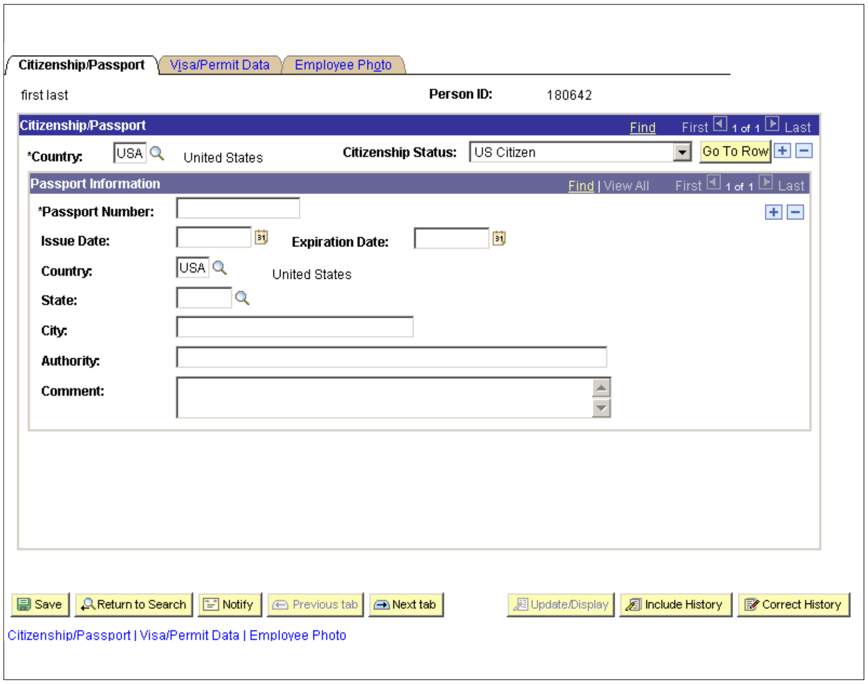

Figure 46. Citizenship/Passport tab - Identification Data page

8. Complete the fields as follows:

Name	This field is populated with the employees name.
Person ID	This field is populated with person ID assigned to the employee.
***Country**	Enter the country or select a country by clicking the search icon.

Citizenship Status	Select the citizenship status from the drop-down list. The valid values are:
***Passport Number**	Enter the passport number.
Issue Date	Enter the date the passport was issued or select a date by clicking the calendar icon.
Expiration Date	Enter the date the passport will expire or select a date by clicking the calendar icon.
Country	Enter the country or select a country by clicking the search icon.

9. Click the ***Visa/Permit Data*** tab. The Visa/Permit Data tab - page (**Figure 47**) is displayed

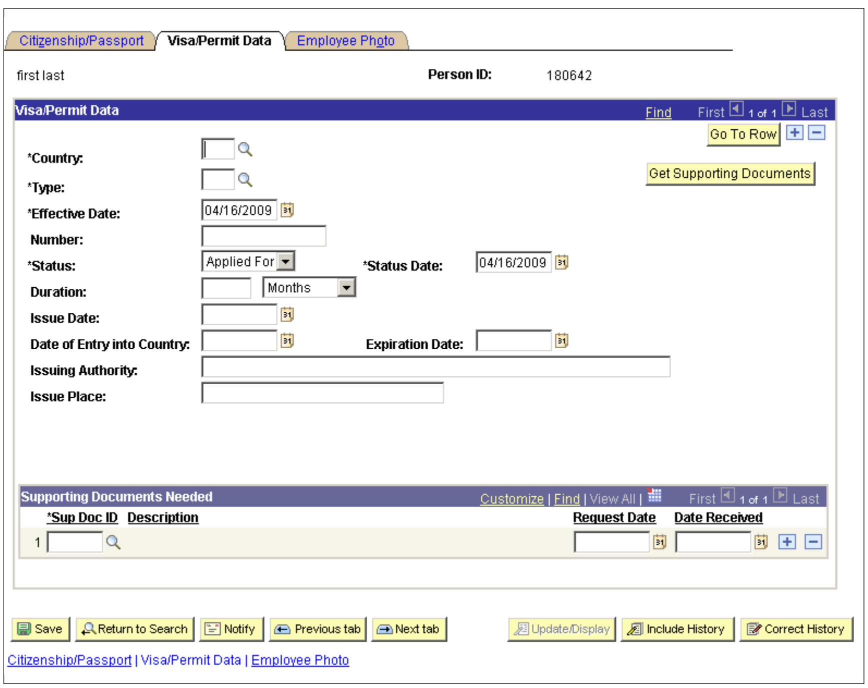

Figure 47.

10. Complete the fields as follows:

Name	This field is populated with the employees name.
Person ID	This field is populated with person ID assigned to the employee.

***Country**	Enter the country or select a country by clicking the search icon.
***Type**	Select the type of visa/permit or select a type by clicking the search icon.
***Effective Date**	Enter the effective date or select a date by clicking the calendar icon.
Number	Enter the visa/permit number.
***Status**	Select a status from the drop-down list. The valid values are:
***Status Date**	Enter the status date or select a date by clicking the calendar icon.
Duration	Enter the number of the duration of the visa/permit, then select the timeframe from the drop-down list. The valid values are:
Issue Date	Enter the date the visa/permit was issued or select a date by clicking the calendar icon.
Date Of Entry Into Country	Enter the date the employee entered into the country or select a date by clicking the calendar icon.
Expiration Date	Enter the expiration date of the visa/permit or select a date by clicking the calendar icon.
Issuing Authority	Enter the issuing authority.
Issue Place	Enter the place the visa/permit was issued.
***Sup Doc ID**	Enter the supporting document ID or slect an ID by clicking the search icon. The description of your entry or selection is displayed to the right.
Request Date	Enter the request date of the visa/permit or select a date by clicking the calendar icon.

Date Received	Enter the receipt date of the visa/permit or select a date by clicking the calendar icon.

11. Select the ***Employee Photo*** tab. The Employee Photo tab - page (**Figure 48**) is displayed.

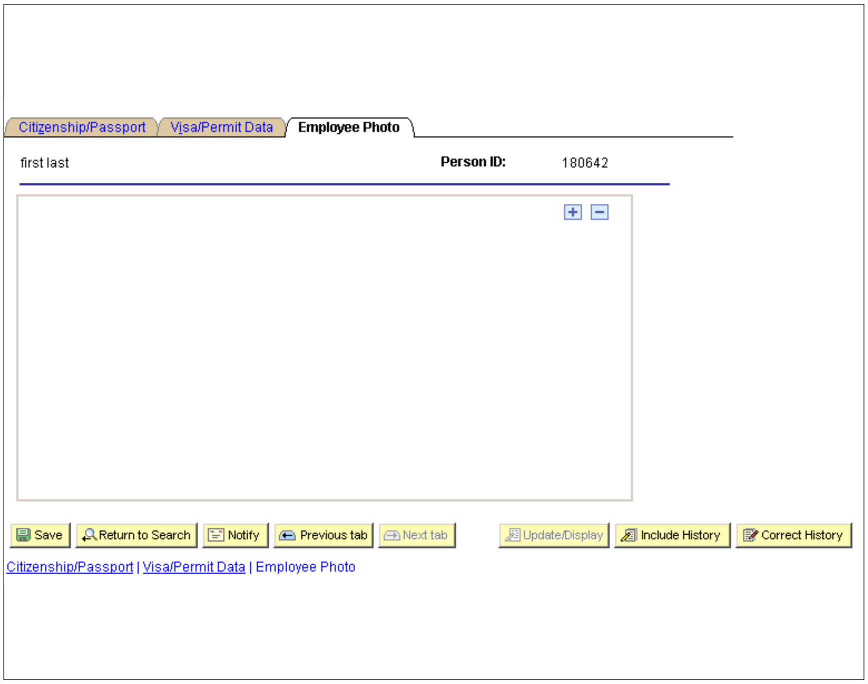

Figure 48.

12. Complete the fields as follows:

Name	This field is populated with the employees name.
Person ID	This field is populated with person ID assigned to the employee.

Step	Description
Click **Save**.	
Click **Return To Search**.	
Click **Previous In List**.	
Click **Next In List**.	
Click **Notify**.	
Click **Previous Tab**.	
Click **Include History**.	
Click **Correct History**.	

Viewing Person Data

This section contains the following topics:

Person Organizational Summary

Expiration Inquiry

Person Organizational Summary

This component will allow users to view all of the relationships with basic information on each.

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Person Organizational Summary*** component. The Find An Existing Value tab - Person Organizational Summary page (**Figure 49**) is displayed.

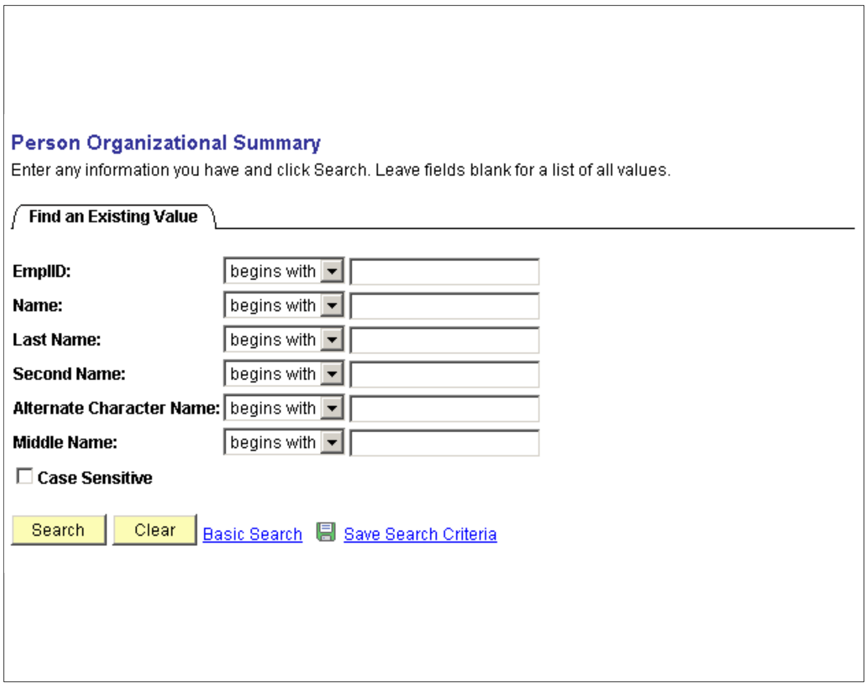

Figure 49. Find An Existing Value tab - Person Organizational Summary page

4. Complete the fields as follows:

EmplID	Enter the EmplID.
Name	Enter the name.
Last Name	Enter the last name.

Second Name	Enter the middle name.
Alternate Character Name	Enter the the nickname.
Middle Name	Enter the middle name.
Case Sensitive	Check this box if applicable.

5. Click **Search** to search for the values entered. The Person Org Summary tab - Person Organizational page (**Figure 50**) is displayed.

   OR

   Click **Clear** to clear all entries.

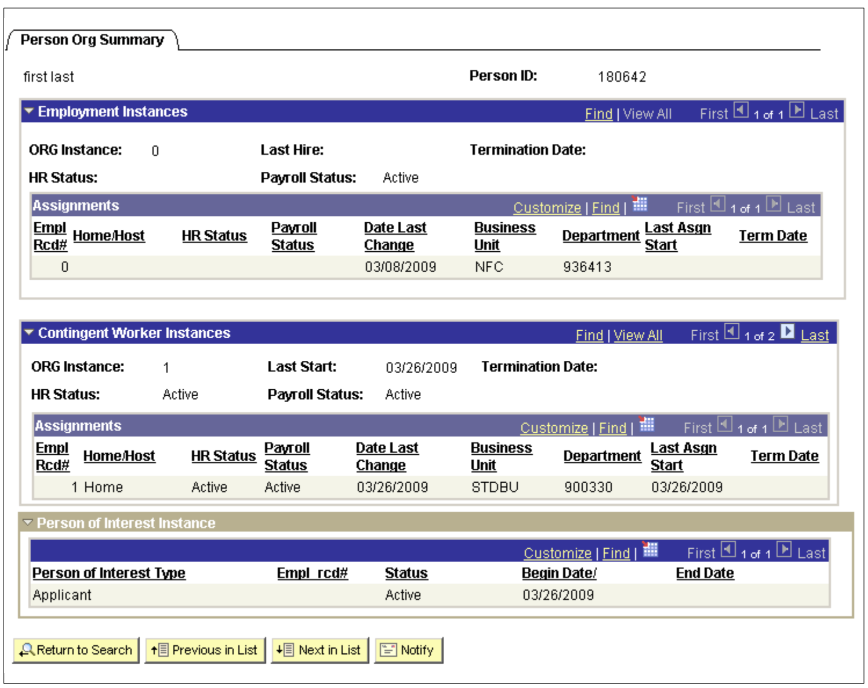

Figure 50. Person Org Summary tab - Person Orgizational page

6. The following fields are included:

Name

Person ID

Employment Instances/ORG Instance

Employment Instances/ Last Hire

Employment Instances/Termination Date

Employment Instances/HR Status

Employment Instances/Payroll Status

Employment Instances/Assignments/Empl Rcd #

Employment Instances/Assignments/ Home/Host

Employment Instances/Assignments/ HR Status

Employment Instances/Assignments/Payroll Status

Employment Instances/Assignments/ Date Last Change

Employment Instances/Assignments/ Business Unit

Employment Instances/Assignments/ Department

Employment Instances/Assignments/Last Asgn Start

Employment Instances/Assignments/Term Date

Contingent Worker Instances/ORG Instance

Contingent Worker Instances/ Last Hire

Contingent Worker Instances/Termination Date

Contingent Worker Instances/HR Status

Contingent Worker Instances/Payroll Status

Contingent Worker Instances/Assignments/Empl Rcd #

Contingent Worker Instances/Assignments/ Home/Host

Contingent Worker Instances/Assignments/ HR Status

Contingent Worker Instances/Assignments/Payroll Status

Employment Instances/Assignments/ Date Last Change

Contingent Worker Instances/Assignments/ Business Unit

Contingent Worker Instances/Assignments/ Department

Contingent Worker Instances/Assignments/Last Asgn Start

Contingent Worker Instances/Assignments/Term Date

Person Of Interest Instance/Person Of Interest Type

Person Of Interest Instance/Empl Rcd#

Person Of Interest Instance/Status

Person Of Interest Instance/ Begin Date/

Person Of Interest Instance/End Date

7. Click **Return To Search** to search for additional employee data.

Expiration Inquiry

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Expiration Inquiry*** component. The Expiration Inquiry page (**Figure 51**) is displayed.

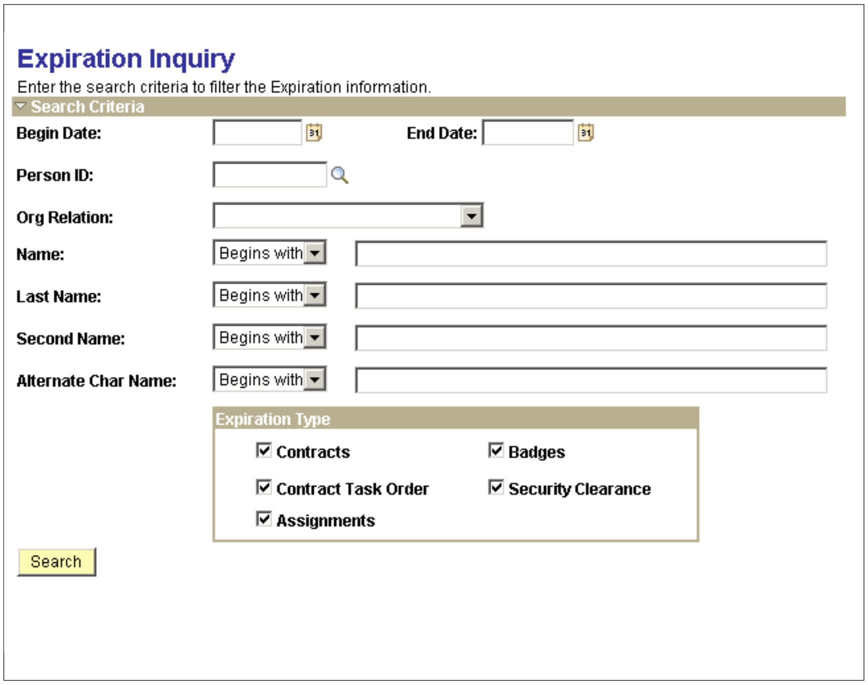

Figure 51. Expiration Inquiry page

4. Complete the fields as follows:

Begin Date	Enter the begin date or select a date by clicking the calendar icon.
End Date	Enter the begin date or select a date by clicking the calendar icon.
Person ID	Enter the person ID or select and ID by clicking the search icon.
Org Relation	Select the org relation from the drop-down list. The valid values are `Contingent Worker`, `Employee`, or `Person Of Interest`.
Name	Enter the first name.
Last Name	Enter the last name.
Second Name	Enter the second name if applicable.
Alternate Char Name	Enter the alternate character name if applicable.

Expiration Type/Contracts	Check this box if applicable.
Expiration Type/Contract Task Order	Check this box if applicable.
Expiration Type/Assignments	Check this box if applicable.
Expiration Type/Badges	Check this box if applicable.
Expiration Type/Security Clearance	Check this box if applicable.

5. Click **Search**. The ???page is displayed.

Security

This section contains the following topics:

Security Clearnace

Badge

Badge/Clearance Access

Security Clearance

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Security Clearance*** component. The Find an Existing Value tab - Security Clearance page (**Figure 52**) is displayed.

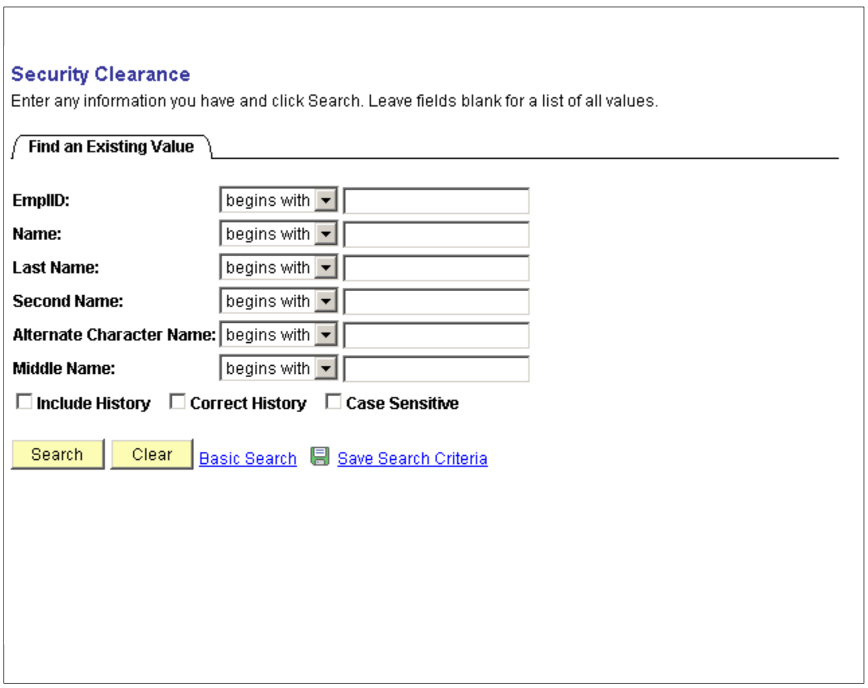

Figure 52. Find an Existing Value tab - Security Clearance page

4. Complete the fields as follows:

EmplID	Enter the EmplID.
Empl Rcd Nbr	Enter the employee record number.
Name	Enter the name.

Last Name	Enter the last name.
Second Name	Enter the middle name.
Alternate Character Name	Enter the the nickname.
Middle Name	Enter the middle name.
Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

5. Click **Search** to search for the values entered.

   OR

   Click **Clear** to clear all entries.

6. Select the applicable value from the search results. The Security Clearance tab - Security Clearance page (**Figure 53**) is displayed.

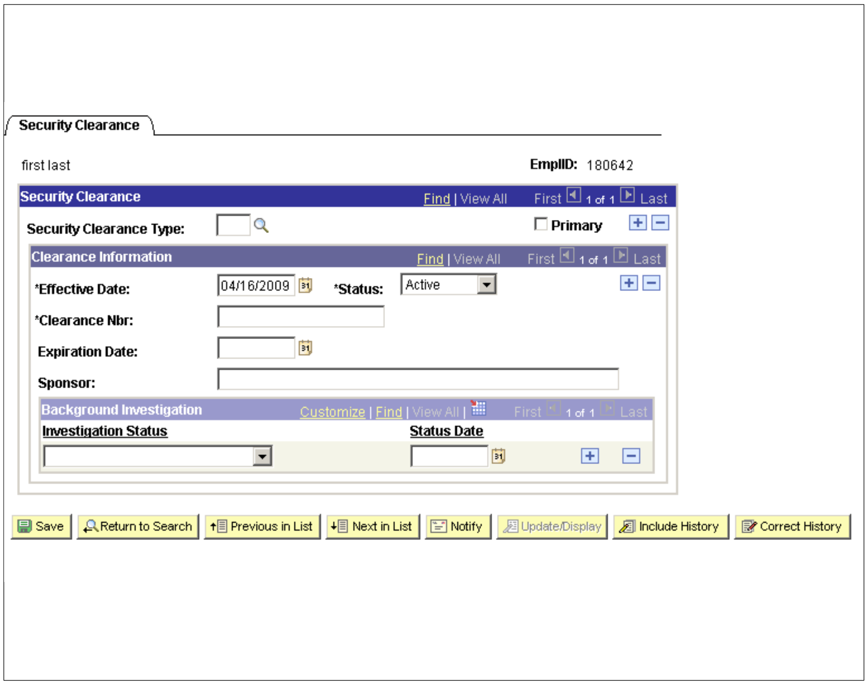

Figure 53. Security Clearance tab - Security Clearance page

7. Complete the fields as follows:

EmplID	This field is populated.
Security Clearance Type	Enter the security clearance type or select a type by clicking on the search icon.
Primary	Check this box if applicable.
Status	Select a status from the drop-down menu. The valid values are `Active` and `Inactive`.
Clearance Nbr	Enter the clearance number.
Expiration Date	Enter the expiration date or select a date by clicking on the calendar icon.
Sponsor	Enter the sponsor.

Investigation Status	Select the investigation status from the drop-down menu. The valid values are:
	Investigation Status Valid Values
	`Approved`
	`Denied`
	`In Progress`
	`Initiated`

Status Date	Enter the status date or select a date by clicking the calendar icon.

8. At this point the following options are available:

Step	Description
Click **Save**	
Click **Return To Search**	
Click **Previous In List**	
Click **Next In List**	
Click **Notify**	
Click **Include History**	
Click **Correct History**	

Badge

1. Select the ***Workforce Administration*** menu group.

2. Select the ***Job Information*** menu.

3. Select the ***Badge*** component. The Find an Existing Value tab - Badge page (**Figure 54**) is displayed.

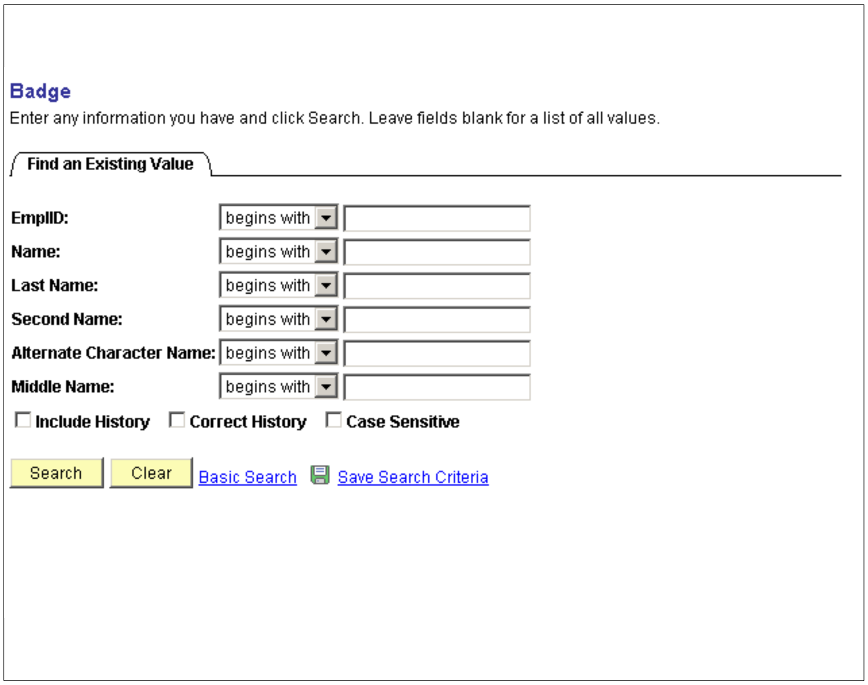

Figure 54. Find an Existing Value tab - Badge page

4. Complete the fields as follows:

EmplID	Enter the EmplID.
Name	Enter the first name.
Last Name	Enter the last name.
Second Name	Enter the middle name.
Alternate Character Name	Enter the the nickname.
Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

5. Click **Search** to search for the values entered.

   OR

   Click **Clear** to clear all entries.

6. Select the applicable value from the search results. The Badge tab - Badge page (**Figure 2**) is displayed.

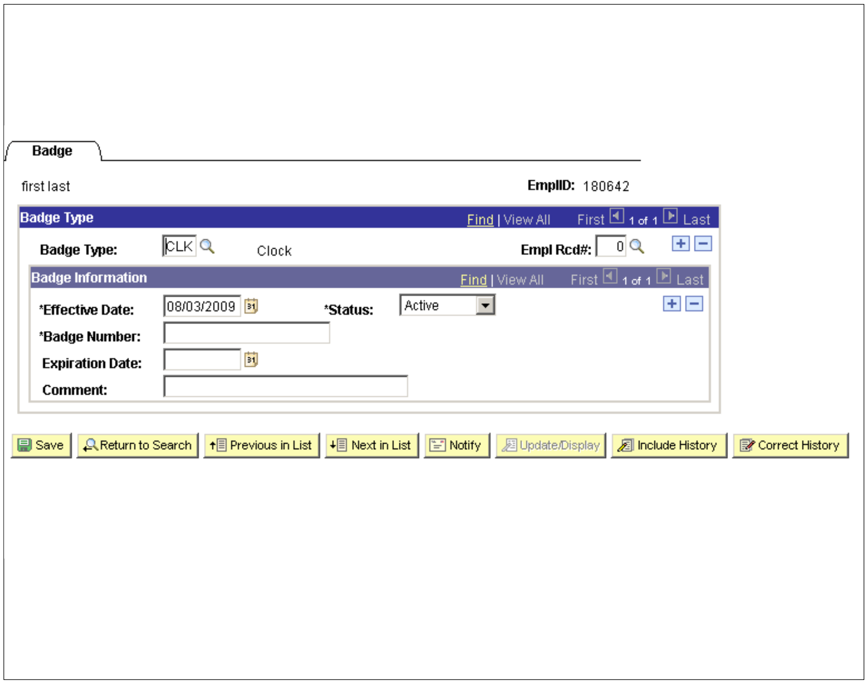

Figure 55. Badge tab - Badge page

7. Complete the fields as follows:

EmplID	Enter the EmplID.
Badge Type	Enter the badge type or select a type by clicking the search icon.
Empl Rcd#	Enter the employee record number or select a number by clicking the search icon.
Effective Date	Enter the effective date or select a date by clicking the calendar icon.
Status	Select a status from the drop-down menu. The valid values are `Active` or `Inactive`.
Badge Number	Enter the badge number.

Expiration Date	Enter the expiration date or select a date by clicking the calendar icon.
Comment	Enter the applicable comments.

8. At this point the following options are available:

Step	Description
Click **Save**.	
Click **Return To Search**.	
Click **Previous In List**.	
Click **Next In List**.	
Click **Notify**.	
Click **Previous Tab**.	
Click **Include History**.	
Click **Correct History**.	

Badge/Clearance Access Summary

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Badge/Clearance Access Summary*** component. The Find an Existing Value tab - Badge/Clearance Access Summary page (**Figure 56**) is displayed.
3.

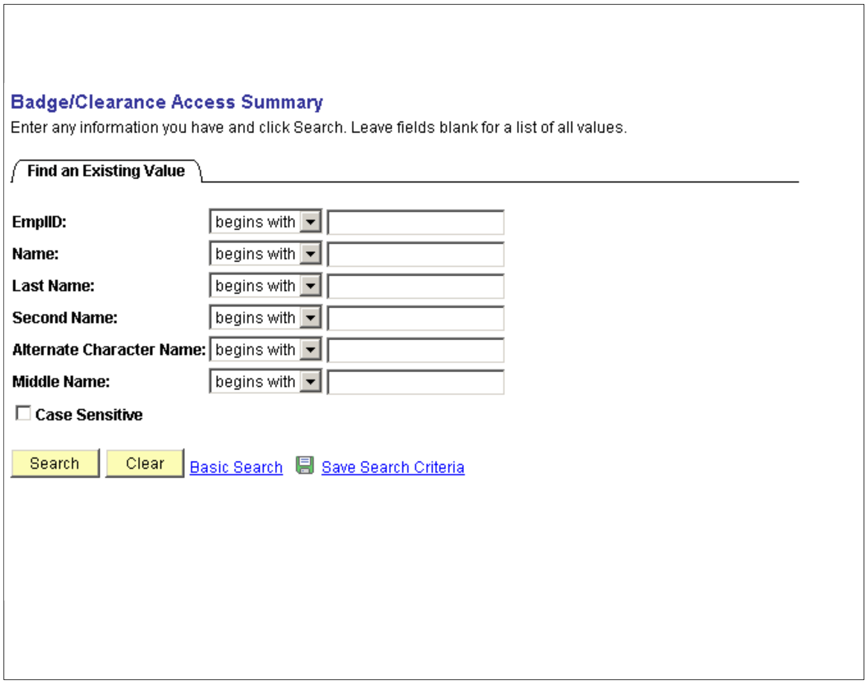

Figure 56. Find an Existing Value tab - Badge/Clearance Access Summary page

4. Complete the fields as follows:

EmplID	Enter the EmplID.
Name	Enter the first name.
Last Name	Enter the last name.
Second Name	Enter the second name.
Alternate Character Name	Enter the the nickname.
Middle Name	Enter the middle name.
Case Sensitive	Check this box if applicable.

5. Click **Search** to search for the values entered.

   OR

   Click **Clear** to clear all entries.

6. Select the applicable value from the search results. The Badge History tab - Badge/Clearance Access Summary page (**Figure 57**) is displayed.

Figure 57. Badge History tab - Badge Information page

7. Complete the fields as follows:

Name	This field is populated with the employees name.
ID	This field is populated with person ID assigned to the employee.
Badge Type	This field is populated with the type of badge assigned to the employee.
Effective Date	This field is populated with date the badge was issued.
Status	This field is populated with the status of the badge.
Badge Number	This field is populated with the employees badge number.
Expiration Date	This field is populated with the expiration date of the employees badge.

8. Click the ***Clearance History*** tab. The Clearance History tab - Badge Information page (**Figure 58**) is displayed.

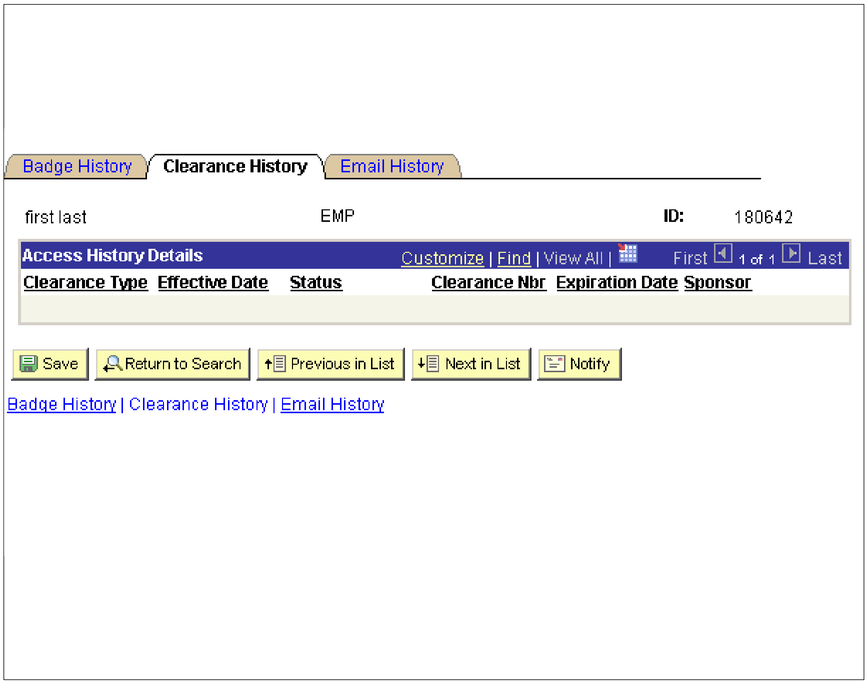

Figure 58. Clearance History tab - Badge Information page

9. Complete the fields as follows:

Name	This field is populated with the employees name.
ID	This field is populated with person ID assigned to the employee.
Clearance Type	This field is populated with the type of security clearance assigned to the employee.
Effective Date	This field is populated with date the security access was granted.
Status	This field is populated with the status of the employees access.
Clearance Number	This field is populated with the employees clearance number.
Expiration Date	This field is populated with the expiration date of the employees security access.
Sponsor	This field is populated with the name of the employees sponsor.

10. Click the ***Email History*** tab. The Email History tab - Badge Information page (**Figure 59**) is displayed.

Figure 59. Email History tab - Badge Information page

11. Complete the fields as follows:

Name	This field is populated with the employees name.
ID	This field is populated with person ID assigned to the employee.
Email Type	This field is populated with the type of email address of the employee.
Email Address	This field is populated with the email address of the employee.

12. At this point the following options are available:

Step	Description
Click **Save**.	
Click **Return To Search**.	
Click **Previous In List**.	
Click **Next In List**.	
Click **Notify**.	

Search

This section contains the following topics:

Search for People

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Personal Information*** menu.
3. Select the ***Search for People*** component. Search/Match page (**Figure 60**) is displayed.

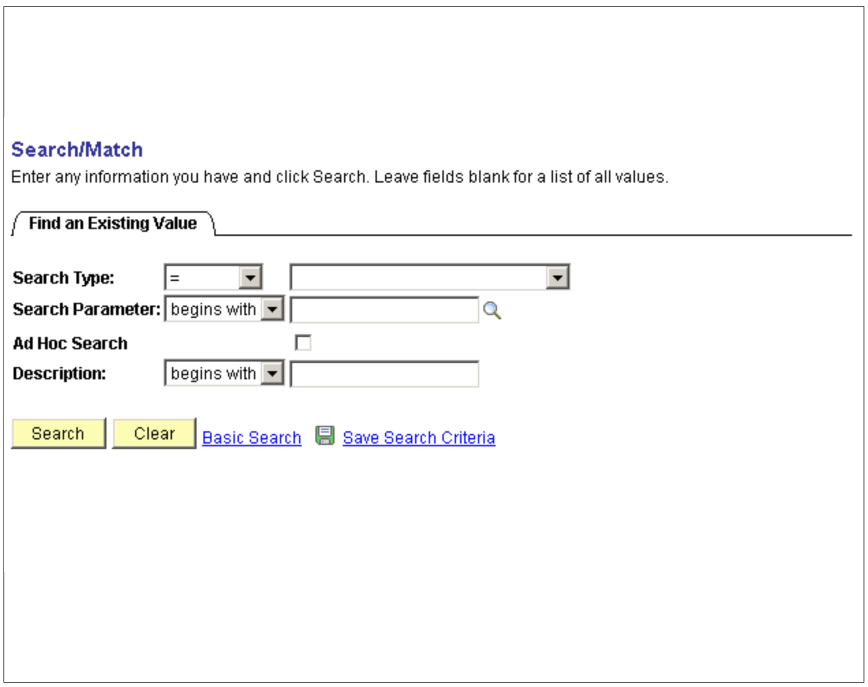

Figure 60. Search/Match page

4. Complete the fields as follows:

Search Type	Select the type of search from the drop-down menu. Valid values are `Applicant`, `Organization`, or `Person`.
Search Parameter	Enter the search parameter or select a parameter by clicking the search icon.
Ad Hoc Search	Check this box if applicable.
Description	Enter the description.

5. Click **Search**. Select the applicable value from the search results. The Search Criteria page is displayed (**Figure 84**). See Search for Matching Persons for more information.

Emergency Contacts

Contract Administration

This section contains the following topics:

Update Contracts

Define Contract Types

Define Contract Clauses

Define Contract Templates

Service Agreements USF

Update Contracts

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Job Information*** menu.
3. Select the ***Contract Administration*** menu item.
4. Select the ***Update Contracts*** component. The Find an Existing Value tab - Update Contracts page (**Figure 61**) is displayed.

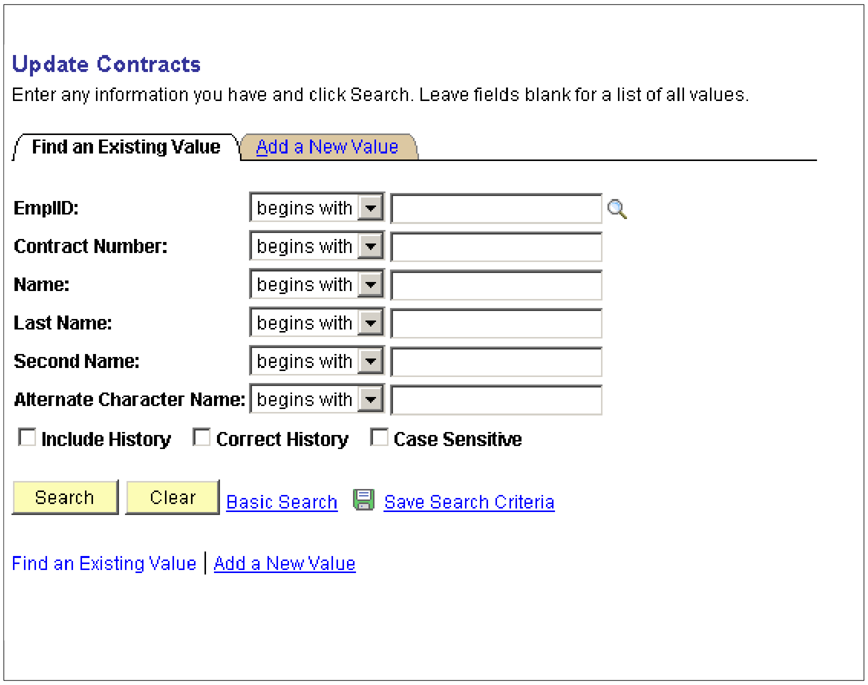

Figure 61. Find an Existing Value tab - Update Contracts page

5. Complete the fields as follows:

EmplID	Enter the EmplID.
Contract Number	Enter the contract number.

Name	Enter the first name.
Last Name	Enter the last name.
Second Name	Enter the middle name.
Alternate Character Name	Enter the the nickname.
Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

6. Click **Search** to search for the values entered.

   OR

   Click **Clear** to clear all entries.

7. Select the applicable value from the search results. The Contract Status/Content tab - Update Contracts page (**Figure 63**) is displayed.

Figure 62. Add a New Value tab - Update Contracts page

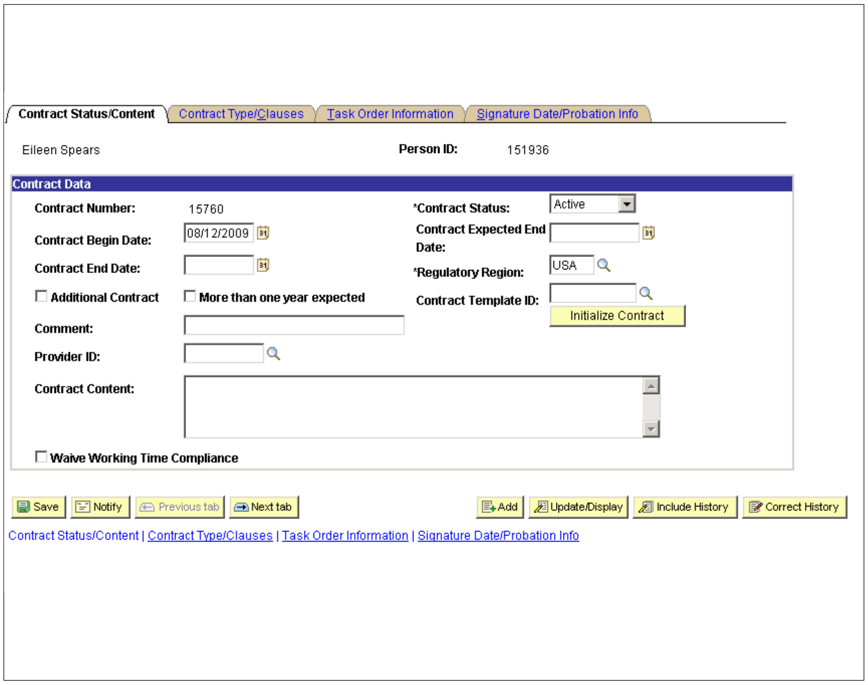

Figure 63. Contract Status/Content tab - Update Contracts page

8. Complete the fields as follows:

Name	This field is populated with the name of the person.
Person ID	This field is populated with the person ID.
Contract Number	This field is populated with the contract number.
Contract Status	Select the contract status from the drop-down menu. The valid values are **`Active`** and **`Inactive`**.
Contract Begin Date	Enter the contract begin date or select a date by clicking on the calendar icon.
Contract Expected End Date	Enter the date the contrac or select a date by clicking on the calendar icon.
Contract End Date	Enter the contract end date or select a date by clicking on the calendar icon.
Regulatory Region	Enter the regulatory region or select a region by clicking the search icon.

Additional Contract — Check this box if applicable.

More Than One Year Expected — Check this box if applicable.

Contract Template ID — Enter the contract template ID or select an ID by clicking the search icon.

Comment — Enter the applicable comments.

Provider ID — Enter the provider ID or select an ID by clicking the search icon.

Contract Content — Enter the contract content.

Waive Working Time Compliance — Check this box if applicable.

9. Click the ***Contract Type/Clauses*** tab. The Contract Type/Clauses tab - Update Contract page (**Figure 64**) is displayed.

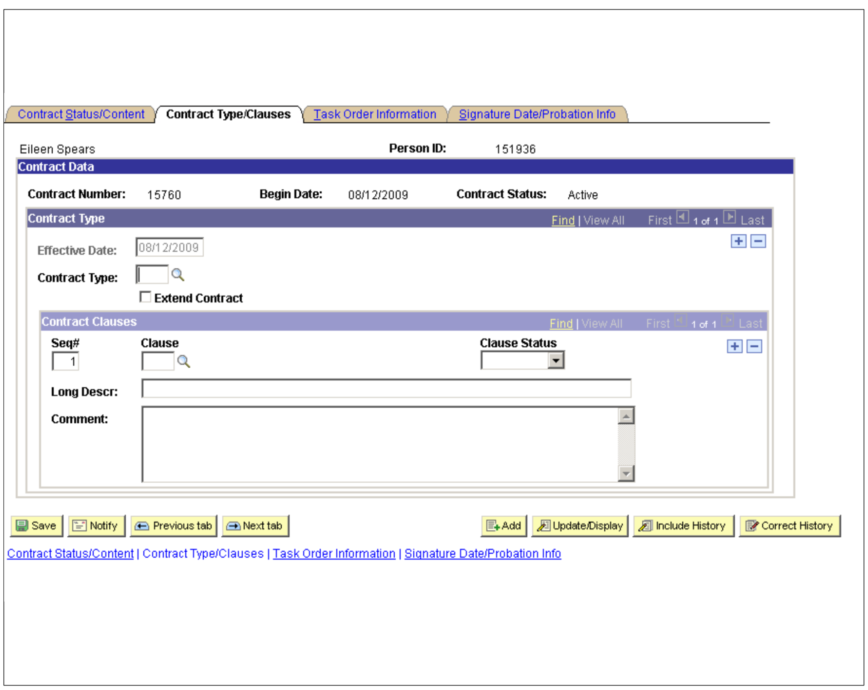

Figure 64. Contract Type/Clauses tab - Update Contract page

10. Complete the fields as follows:

Name — This field is populated with the name of the person.

Person ID	This field is populated with the person ID.
Contract Number	This field is populated based on the selection made on the Contract Status/Content tab (**Figure 64**).
Contract Begin Date	This field is populated based on the selection made on the Contract Status/Content tab (**Figure 64**).
Contract Status	This field is populated based on the selection made on the Contract Status/Content tab (**Figure 64**).
Effective Date	This field is populated.
Contract Type	Enter the contract type or select a type by clicking on the search icon.
Extend Contract	Check this box if applicable.
Seq #	Enter the sequence number.
Clause	Enter the clause or select a clause by clicking the search icon.
Clause Status	Select the clause status from the drop-down menu. The valid values are `Optional` and `Required`.
Long Descr	Enter the long description.
Comment	Enter the applicable comments.

11. Click the ***Task Order Information*** tab. The Task Order Inforamtion tab - Update Contract page (**Figure 65**) is displayed.

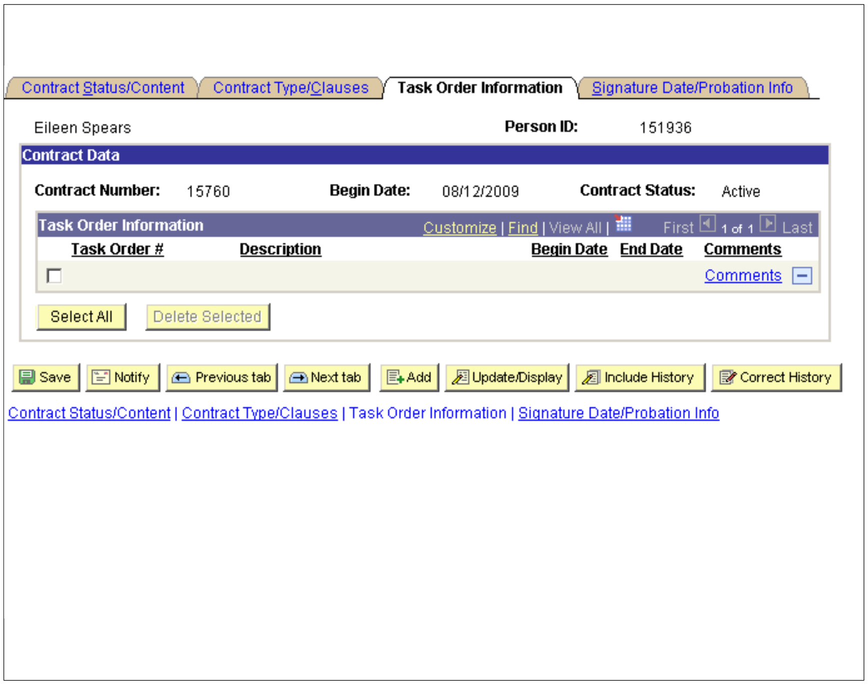

Figure 65. Task Order Information tab - Update Contract page

12. Complete the fields as follows:

Name	This field is populated with the person's name.
Person ID	This field is populated with the person ID.
Contract Number	This field is populated based on the selection made on the Contract Status/Content tab (**Figure 64**).
Begin Date	This field is populated based on the selection made on the Contract Status/Content tab (**Figure 64**).
Contract Status	This field is populated based on the selection made on the Contract Status/Content tab (**Figure 64**).
Task Order #	
Description	
Begin Date	
End Date	

Comments

13. Click the ***Signature Date/Probation Info*** tab. The Signature Date/Probation Info tab - Update Contract page (**Figure 66**) is displayed.

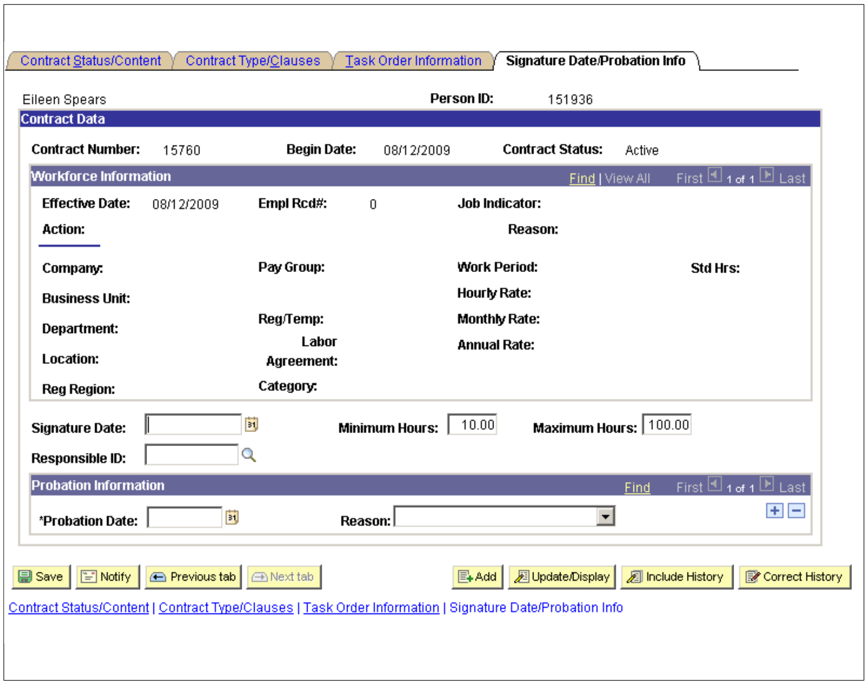

Figure 66. Signature Date/Probation Info tab - Update Contract page

14. Complete the fields as follows:

Name	This field is populated with the person's name.
Person ID	This field is populated with the person ID.
Contract Number	This field is populated based on the selection made on the Contract Status/Content tab (**Figure 64**).
Begin Date	This field is populated based on the selection made on the Contract Status/Content tab (**Figure 64**).
Contract Status	This field is populated based on the selection made on the Contract Status/Content tab (**Figure 64**).
Effective Date	This field is populated.
Empl Rcd#	This field is populated.

Job Indicator	This field is populated.
Action	This field is populated.
Reason	This field is populated.
Company	This field is populated.
Pay Group	This field is populated.
Work Period	This field is populated.
Std Hrs	This field is populated.
Business Unit	This field is populated.
Hourly Rate	This field is populated.
Department	This field is populated.
Reg/Temp	This field is populated.
Monthly Rate	This field is populated.
Location	This field is populated.
Labor Agreement	This field is populated.
Annual Rate	This field is populated.
Reg Region	This field is populated.
Category	This field is populated.
Signature Date	Enter the signature date or select a date by clicking the calendar icon.

Minimum Hours	Enter the munimum number of hours.
Maximum Hours	Enter the maximum number of hours.
Responsible ID	Enter the responsible ID or select an ID by clicking the search icon.
Probation Date	Enter the probation date or select a date by clicking the calendar icon.
Reason	Select a reason from the drop-down menu. The valid values are **`New Date Needed`** and **`Unsatisfactory Performance`**.

15. At this point the following options are available:

Step	Description
Click **Save**	
Click **Notify**	
Click **Previous Tab**	
Click **Add**	
Click **Update Display**	
Click **Include History**	
Click **Correct History**	

Define Contract Types

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Job Information*** menu.
3. Select the ***Contract Administration*** menu item.
4. Select the ***Define Contract Types*** component. The Find an Existing Value tab - Define Contract Types page (**Figure 67**) is displayed.

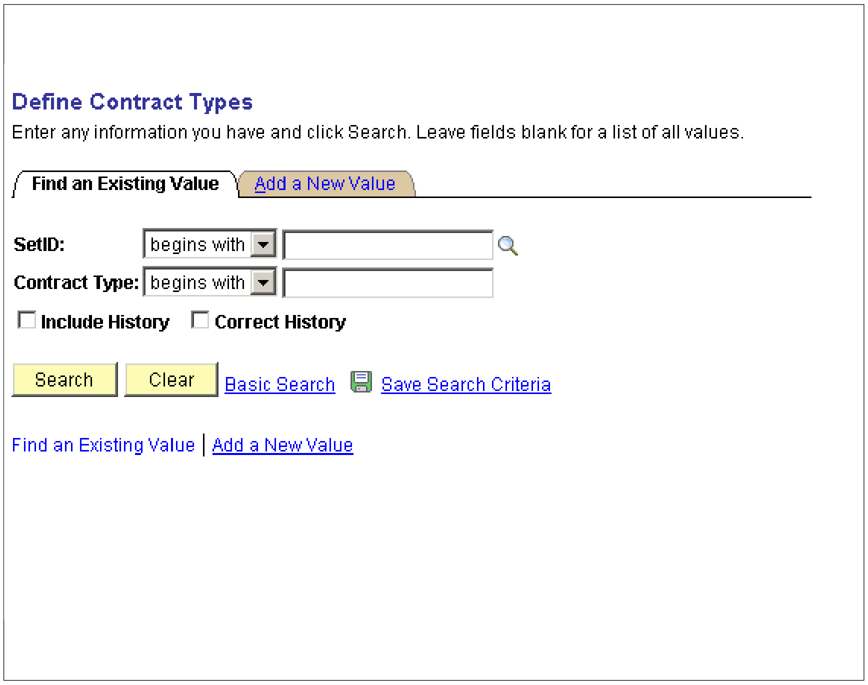

Figure 67. Find an Existing Value tab - Define Contract Types page

5. Complete the fields as follows:

SetID	Enter the SetID or select an ID by clicking the search icon.
Contract Type	Enter the contract type
Include History	Check this box if applicable.
Correct History	Check this box if applicable.

6. Click **Search** to search for the values entered.

OR

Click **Clear** to clear all entries.

OR

7. Click the ***Add A New Value*** tab. The Add A New Value tab - Define Contract Types page (**Figure 68**) is displayed.

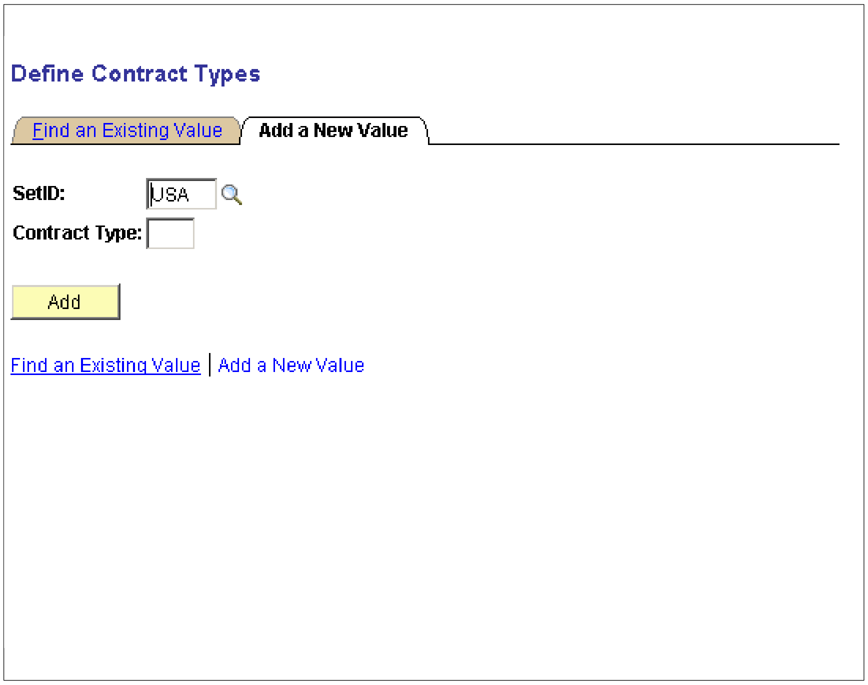

Figure 68. Add a New Value tab - Define Contract Types page

8. Complete the fields as follows:

SetID	Enter the setID or select an ID by clicking the search icon.
Contract Type	Enter the contract type.

9. Click **Add**. The Contract Type Table page (**Figure 69**) is displayed.

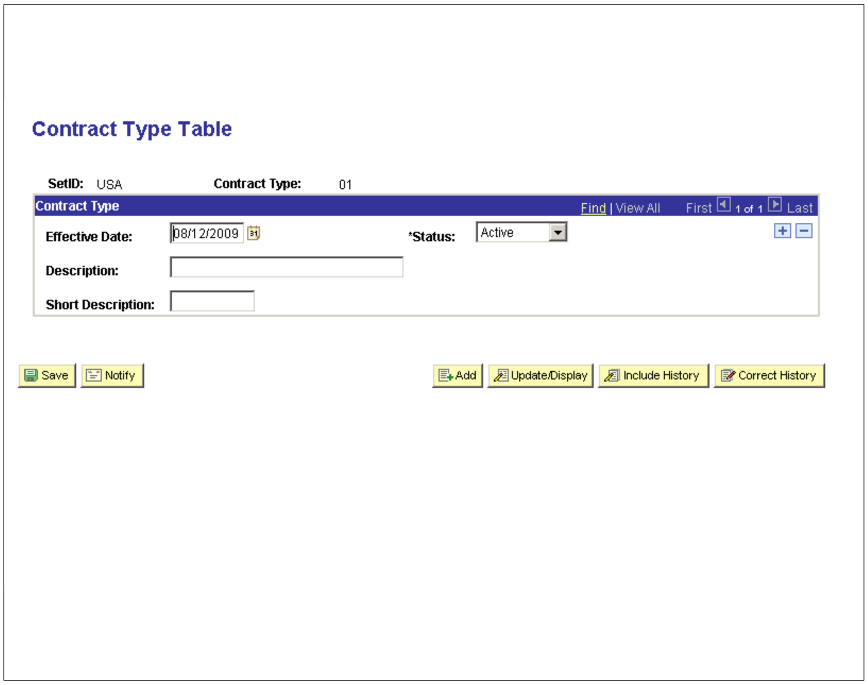

Figure 69. Contract Type Table page

10. Complete the fields as follows:

SetID	This field is populated with the search criteria entered or selected.
Contract Type	This field is populated with the search criteria entered or selected.
Effective Date	Enter the effective date or select a date by clicking the calendar icon.
Status	Select the status from the drop-down menu. The valid values are `Active` and `Inactive`.
Description	Enter the description
Short Description	Enter the short description.

11. At this point the following options are available:

Step	Description
Click **Save**	
Click **Notify**	

Step	Description
Click **Add**	
Click **Update Display**	
Click **Include History**	
Click **Correct History**	

Define Contract Clauses

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Job Information*** menu.
3. Select the ***Contract Administration*** menu item.
4. Select the ***Define Contract Clauses*** component. The Find an Existing Value tab - Define Contract Clauses page (**Figure 70**) is displayed.

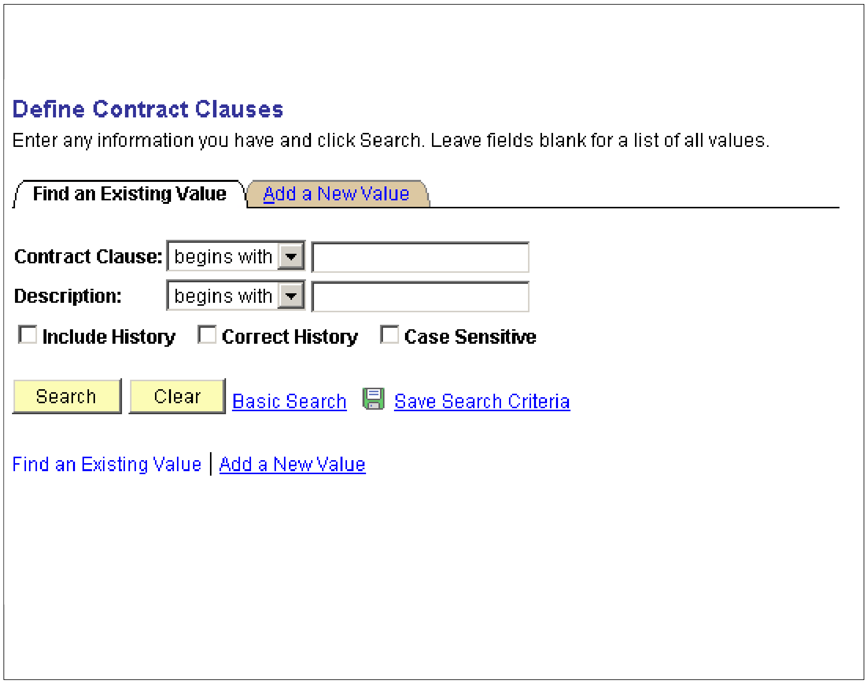

Figure 70. Find an Existing Value tab - Define Contract clauses page

5. Complete the fields as follows:

Contract Clause	Enter the contract clause.
Description	Enter the description.
Include History	Check this box if applicable.

Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

6. Click **Search** to search for the values entered. Select the applicable value. The Contract Clause Table tab - Define Contract Clauses page (**Figure 72**) is displayed.

   OR

   Click **Clear** to clear all entries.

   OR

   Click the ***Add a New Value*** tab. The Add a New Value tab - Define Contract Clauses page (**Figure 71**) is displayed.

Figure 71. Add a New Value tab - Define Contract Clauses page

7. Complete the field as follows:

Contract Clause	Enter the contract clause.

8. Click **Add** to add the new value entered. The Contract Clause Table tab - Define Contract Clauses page (**Figure 72**) is displayed.

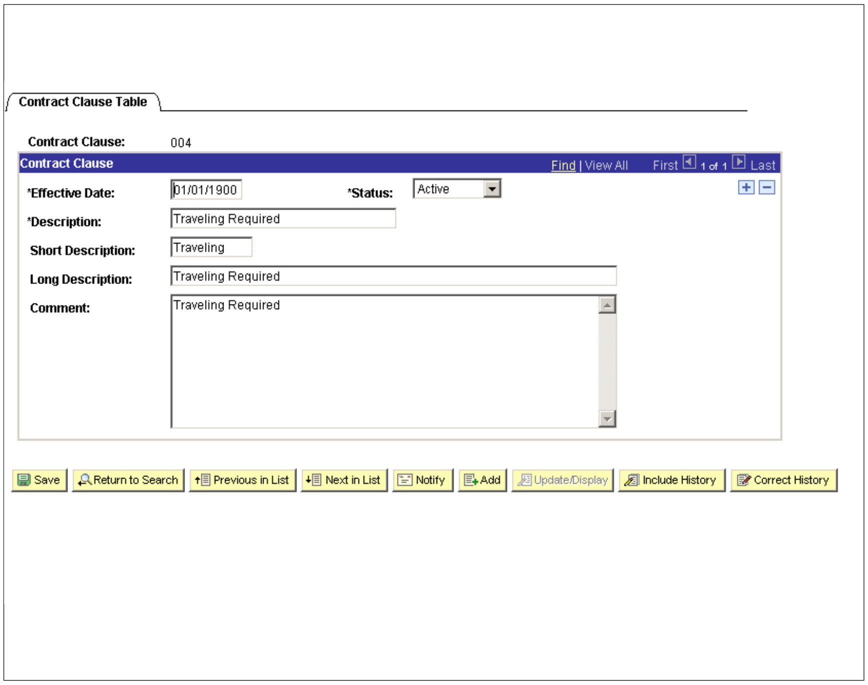

Figure 72. Contract Clause Table tab - Define Contract Clauses page

9. Complete the fields as follows:

Contract Clause	This field is populated with the search criteria entered or selected.
Effective Date	Enter the effective date or select a date by clicking the calendar icon.
Status	Select the status from the drop-down menu. The valid values are **`Active`** and **`Inactive`**.
Short Description	Enter the short description.
Long Description	Enter the long description.
Comment	Enter the applicable comments.

10. At this point the following options are available:

Step	Description
Click **Save**	
Click **Return to Search**	
Click **Previous in List**	

Step	Description
Click **Next in List**	
Click **Notify**	
Click **Add**	
Click **Include History**	
Click **Correct History**	

Define Contract Templates

1. Select the ***Workforce Administration*** menu group.

2. Select the ***Job Information*** menu.

3. Select the ***Contract Administration*** menu item.

4. Select the ***Define Contract Templates*** component. The Find an Existing Value tab - Define Contract Templates page (**Figure 73**) is displayed.

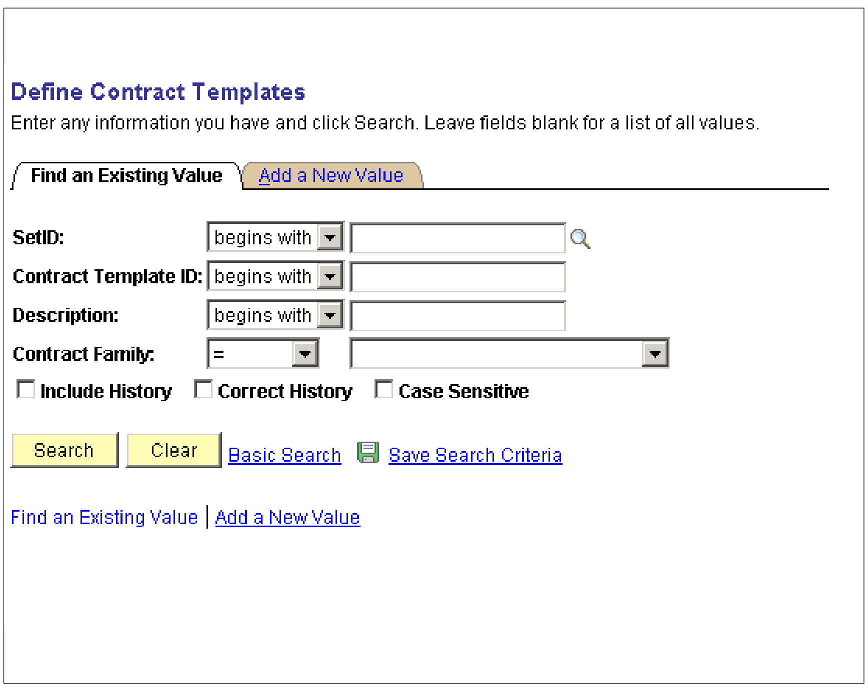

Figure 73. Find an Existing Value tab - Define Contract Templates page

5. Complete the fields as follows:

SetID	Enter the SetID or select an ID by clicking the search icon.
Contract Template ID	Enter the contract template ID.

Description	Enter the description.
Contract Family	Select the contract family from the drop-down menu. The valid values are `Regular` and `Temporary`.
Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

6. Click **Search** to search for the values entered. Select the applicable value. The Contract Template Table page (**Figure 75**) is displayed.

   OR

   Click **Clear** to clear all entries.

   OR

   Click the ***Add a New Value*** tab. The Add a New Value tab - Define Contract Templates page (**Figure 74**) is displayed.

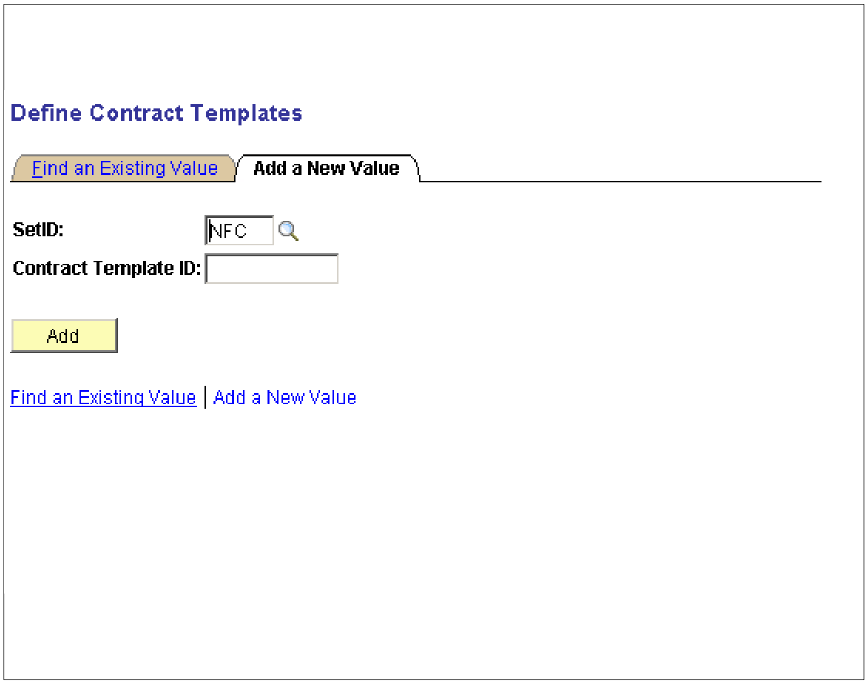

Figure 74. Add A New Value tab - Define Contract Templates page

7. Complete the fields as follows:

SetID	Enter the setID or select an ID by clicking the search icon.

Contract Template ID	Enter the contract template ID.

8. Click **Add** to add the new value entered. The Contract Template Table page (**Figure 75**) is displayed.

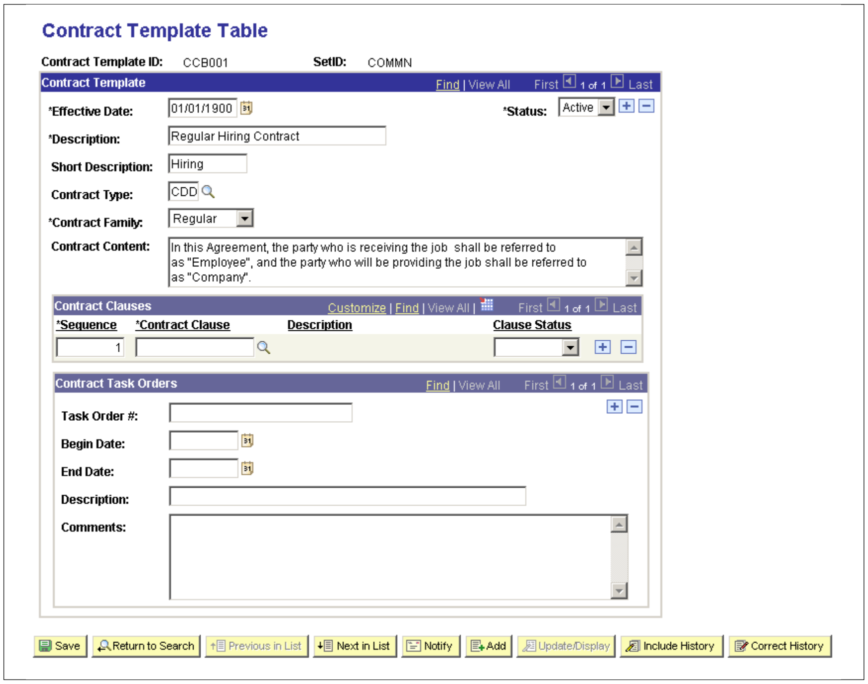

Figure 75. Contract Template Table page

9. Complete the fields as follows:

Contract Template ID	This field is populated with the search criteria entered or selected.
SetID	This field is populated with the search criteria entered or selected.
Effective Date	Enter the effective date or select a date by clicking the calendar icon.
Status	Select the status from the drop-down menu. The valid values are `Active` and `Inactive`.
Description	Enter the description.
Short Description	Enter the short description.

Contract Type	Enter the contract type or select a type by clicking the search icon.
Contract Family	Select the contract family from the drop-down menu. The valid values are `Regular` and `Temporary`.
Contract Content	Enter the applicable contract content.
Sequence	Enter the sequence number.
Contract Cluase	Enter the contract clause or select a clause by clicking the search icon.
Description	This field is populated based on the contract clause entered or selected.
Clause Status	Select the clause status from the drop-down menu. The valid values are `Optional` and `Required`.
Task Order #	Enter the task order number.
Begin Date	Enter the begin date or select a date by clicking the calendar icon.
End Date	Enter the end date or select a date by clicking the calendar icon.
Description	Enter the description.
Comments	Enter the applicable comments.

10. At this point the following options are available:

Step	Description
Click **Save**	
Click **Notify**	
Click **Add**	
Click **Update Display**	
Click **Include History**	
Click **Correct History**	

Service Agreements USF

1. Select the ***Workforce Administration*** menu group.
2. Select the ***Job Information*** menu.
3. Select the ***Contract Administration*** menu item.
4. Select the ***Service Agreements USF*** component. The Find an Existing Value tab - Service Agreements USF page (**Figure 76**) is displayed.

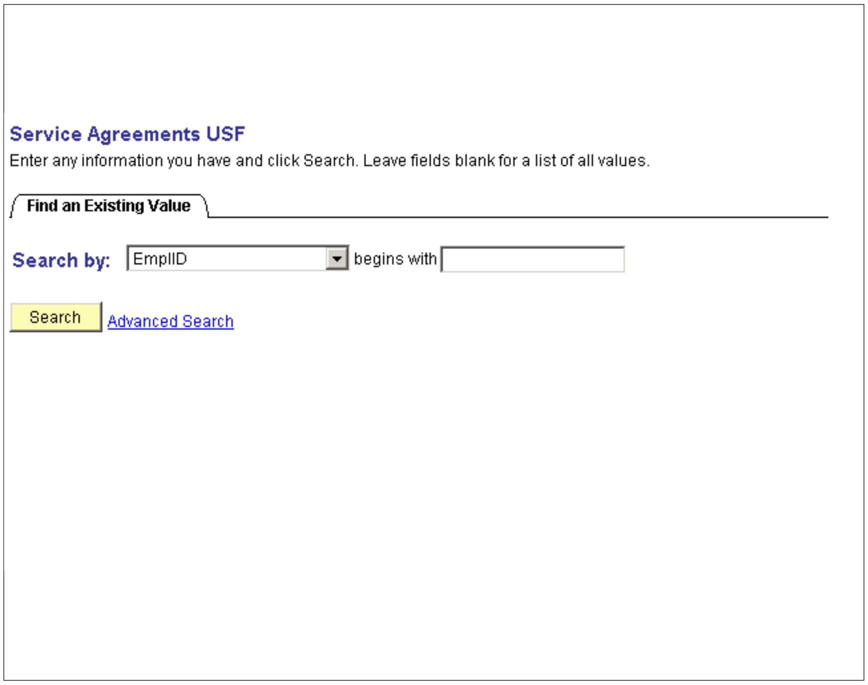

Figure 76. Find an Existing Value tab - Service Agreements USF page

Search By	Select the applicable value to search by from the drop-down menu. The valid values are:
	Search By Valid Values
	`Alternate Character Name`
	`Empl Rcd Nbr`
	`EmplID`
	`Last Name`
	`Middle Name`
	`Name`
	`Second Name`

Begins With	Enter the applicable value based on the search criteria selected.

5. Click **Search**. The Service Agreements tab - Service Agreements USF page (**Figure 77**) is displayed.

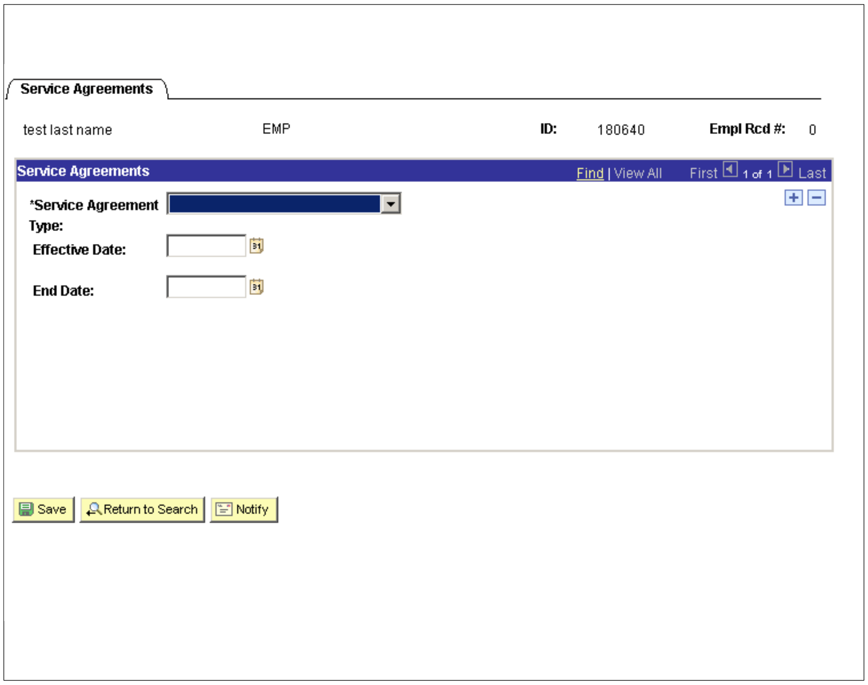

Figure 77. Service Agreements tab - Service Agreements USF page

6. Complete the fields as follows:

Name	This field is populated.
ID	This field is populated
Empl Rcd #	This field is populated.
Service Agreement Type	Select the service agreement type from the drop-down menu. The valid values are **`Long Term Training`**, **`Recruitment Bonus`**, and **`Relocation Bonus`**.
Effective Date	Enter the effective date or select a date by clicking the calendar icon.
End Date	Enter the end date or select a date by clicking the calendar icon.

7. At this point the following options are available:

Step	Description
Click **Save**	
Click **Return To Search**	
Click **Notify**	

Configure Checklist

Configure checklist allows the user to establish checklists that can be assigned to employees, contingent workers and person(s) of interest.

1. Select the ***Set Up HRMS*** menu group.
2. Select the ***Common Definitions*** menu.
3. Select the ***Checklists*** menu item.
4. Select the ***Checklist*** component. The Find an Existing Value tab - Service Agreements USF page (**Figure 78**) is displayed.

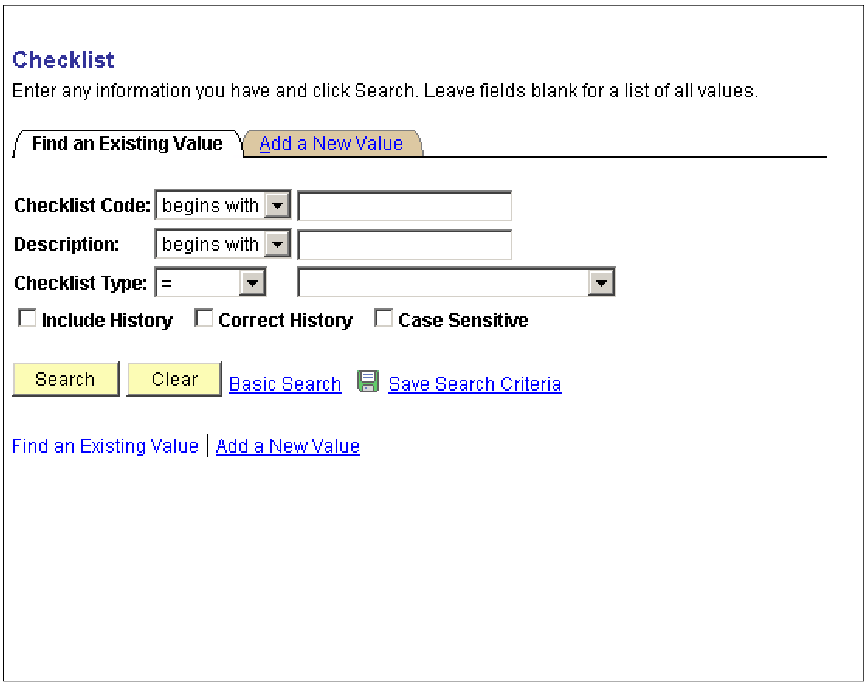

Figure 78. Find An Existing Value tab - Checklist page

5. Complete the fields as follows:

Checklist Code	Enter the checklist code.
Description	Enter the description.

Checklist Type	Select the checklist type from the drop-down menu. The valid values are:
	Checklist Type Valid Values
	`Hiring`
	`Medical`
	`Organizational Instance`
	`Other`
	`Termination`
	`Training`
	`Transfer`

Include History	Check this box if applicable.
Correct History	Check this box if applicable.
Case Sensitive	Check this box if applicable.

6. Click **Search**. Select the applicable value. The Checklist Table page (**Figure 80**) is displayed.

OR

Click **Clear** to clear the entries.

OR

Click the ***Add A New Value*** tab. The Add A New Value tab - Checklist page (**Figure 79**) is displayed.

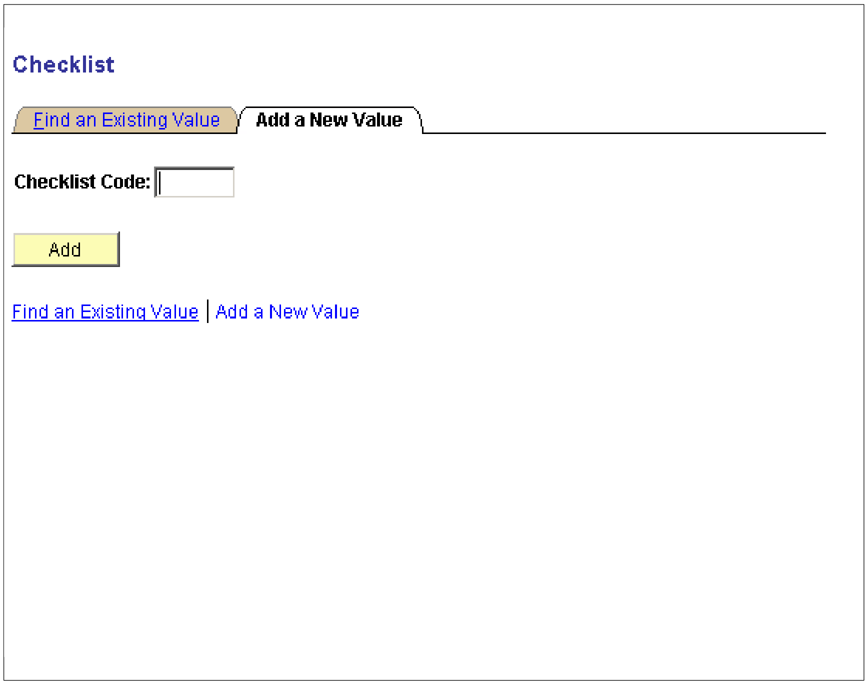

Figure 79. Add A New Value tab - Checklist page

7. Complete the field as follows:

Checklist Code	Enter the checklist code to be added.

8. Click **Add** to add the new checklist code. The Checklist Table page (**Figure 80**) is displayed.

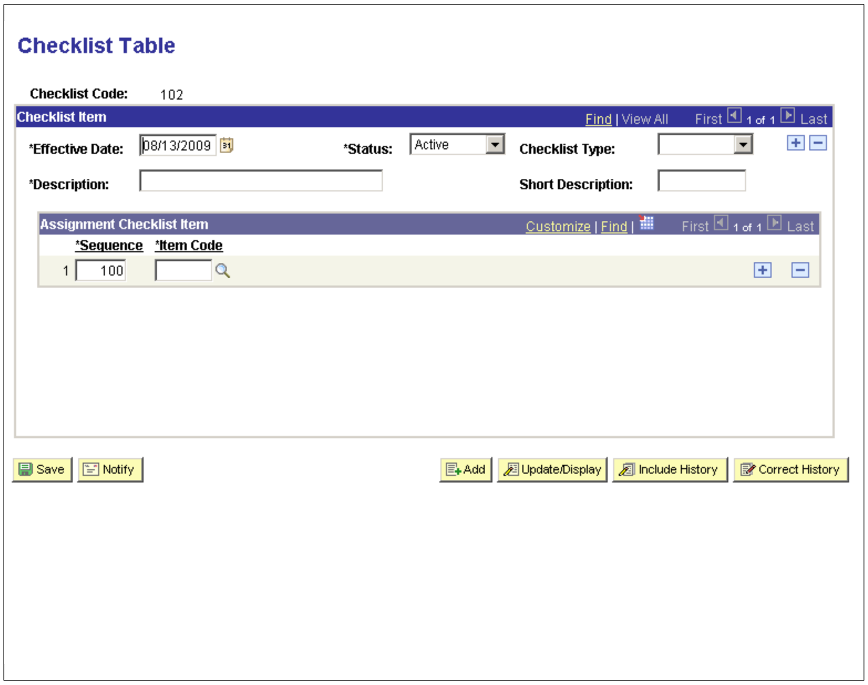

Figure 80. Checklist Table page

9. Complete the fields as follows:

Checklist Code	This field is populated with the search criteria entered or selected.
Effective Date	Enter the effective date or select a date by clicking the calendar icon.
Status	Select the status from the drop-down menu. The valid values are `Active` and `Inactive`.
Checklist Type	Select the checklist type from the drop-down menu. The valid values are:

Checklist Type Valid Values

`Hiring`

`Medical`

`Organizational Instance`

`Other`

`Termination`

`Training`

`Transfer`

Description	Enter the description.

Short Description	Enter the short description.
Sequence	This field is populated.
Item Code	Enter the item code or select a code by clicking the search icon.

10. At this point the following options are available:

Step	Description
Click **Save**	
Click **Notify**	
Click **Add**	
Click **Update Display**	
Click **Include History**	
Click **Correct History**	

Configure Person of Interest Types

This component allows users to establish POI types that can me associated with person(s) of interest that will be mainained in ***EmpowHR***.

1. Select the ***Set Up HRMS*** menu group.
2. Select the ***Foundation Tables*** menu.
3. Select the ***Organization*** menu item.
4. Select the ***Person of Interest Types*** component. The Find an Existing Value tab - Person of Interest Types page (**Figure 81**) is displayed.

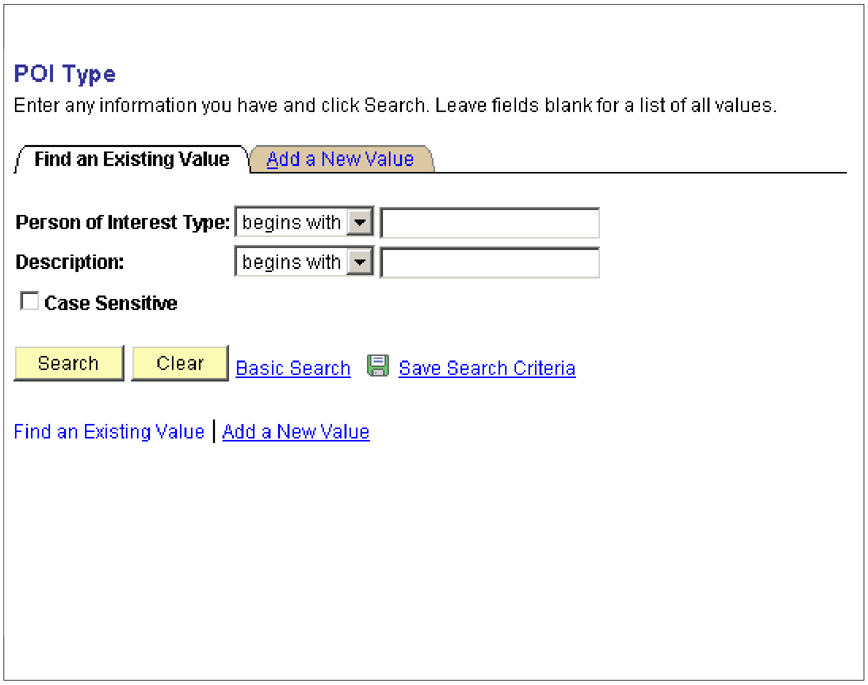

Figure 81. Find an Existing Value tab - POI Type page

5. Complete the fields as follows:

Person of Interest Type	Enter the person of interest type.
Description	Enter the description.
Case Sensitive	Check this box if applicable.

6. Click **Search** to search for the values entered. Select the applicable value. The Person of Interest Type Table tab - POI Type page (**Figure 83**) is displayed.

OR

Click **Clear** to clear the entries.

OR

Click the ***Add A New Value*** tab. The Add A New Value tab - POI Type page (**Figure 82**) is displayed.

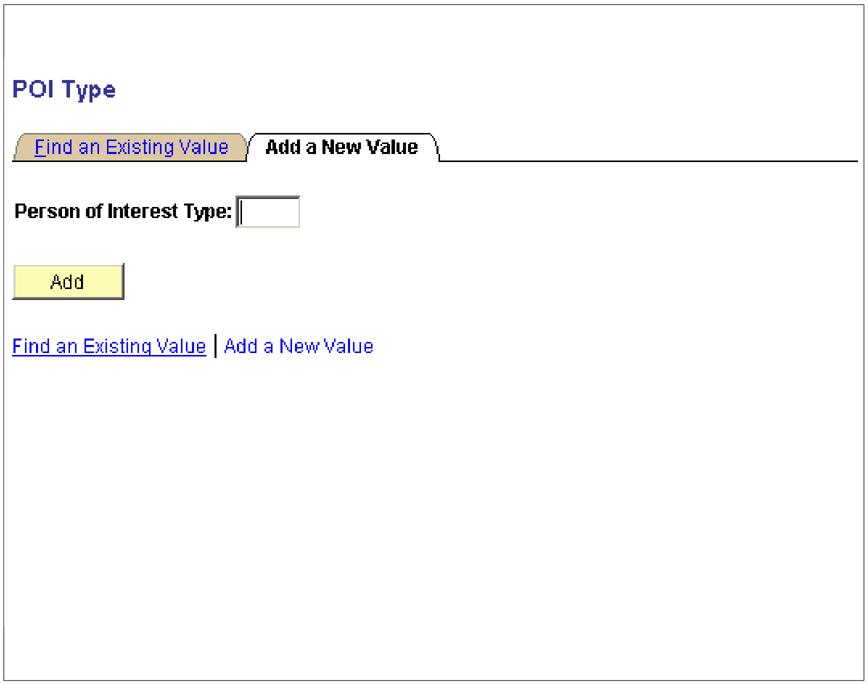

Figure 82. Add A New Value tab - POI Type page

7. Complete the field as follows:

Person of Interest Type	Enter the person of interest type to be added.

8. Click **Add**. The Person of Interest Type Table tab - POI Type page (**Figure 83**) is displayed.

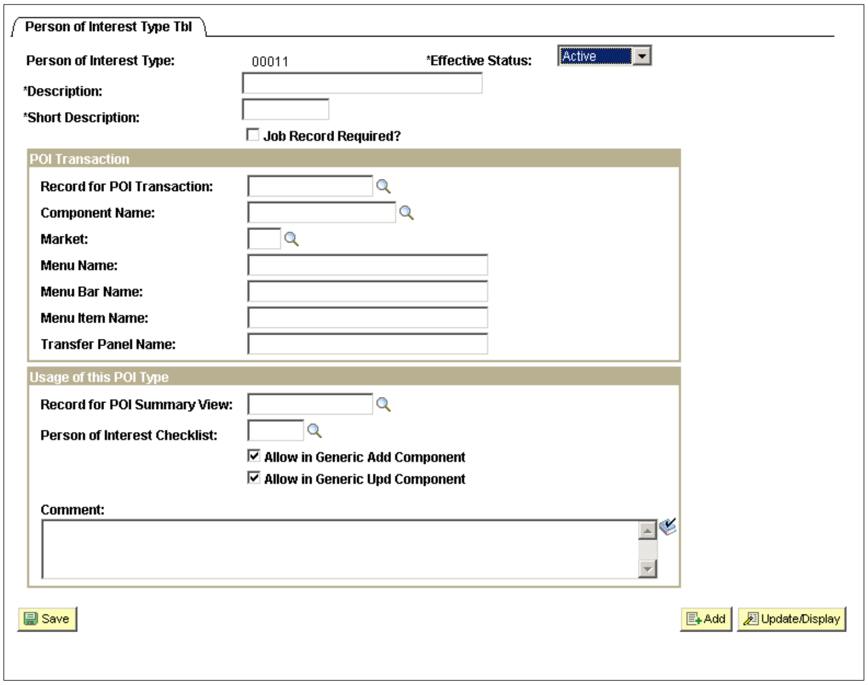

Figure 83. Person of Interest Type Table tab - POI Type page

9. Complete the fields as follows:

Person of Interest Type	This field is populated with the search criteria entered or selected.
Effective Status	Select the effective status from the drop-down menu. The valid values are `Active` and `Inactive`.
Description	Enter the description.
Short Description	Enter the short description.
Job Record Required	Check this box if applicable.
Record for POI Transaction	Enter the record for POI transaction or select a record by clicking the search icon.
Component Name	Enter the component name or select a name by clicking the search icon.
Market	Enter the market or select a market by clicking the search icon.

Menu Name	Enter the menu name.
Menu Bar Name	Enter the menu bar name.
Menu Item Name	Enter the menu item name.
Transfer Panel Name	Enter the transfer panel name.
Record for POI Summary View	Enter the record for POI summary view or select a record by clicking the search icon.
Person of Interest Checklist	Enter the person of interest checklist or select a checklist by clicking the search icon.
Allow in Generic Add Component	Check this box if applicable.
Allow in Generic Upd Component	Check this box if applicable.
Comment	Enter the applicable comments.

10. At this point the following options are available:

Step	Description
Click **Save**	
Click **Add**	
Click **Update Display**	

Search for Matching Persons

11. Click the ***Search for Matching Persons*** link. The Search Criteria page (**Figure 84**) is displayed.

Figure 84. Search Criteria page

12. Complete the fields as follows:

Search Type	This field is populated.
Ad Hoc Search	This box defaults to being unchecked and cannot be modified.
Search Parameter	This field is populated with the guidelines of the search and cannot be modified.
Search Result Code	Enter the applicable search code or select a code by clicking the search icon.
Address Line 1	Enter the address.
City	Enter the city.
First Name Search	Enter the first name.

Last Name Search	Enter the last name.
Date Of Birth	Enter the date of birth or select a date by clicking on the calendar icon.
Gender	Enter the gender information.
National ID	Enter the national ID.
Search By Order Number/Search Order	This field is populated.
Search By Order Number/Description	This field is populated with the description of the corresponding search order.

13. At this point the following options are available:

Step	Description
Click **Search**	To search based on the criteria entered.
Click **Clear All**	To clear all prior entries on this page.
Click **Selective Search**	To narrow down the search criteria for the category selected.

Add a Name

Add Name:

1. Click the ***Add Name*** link. The Edit Name page (**Figure 85**) is displayed.

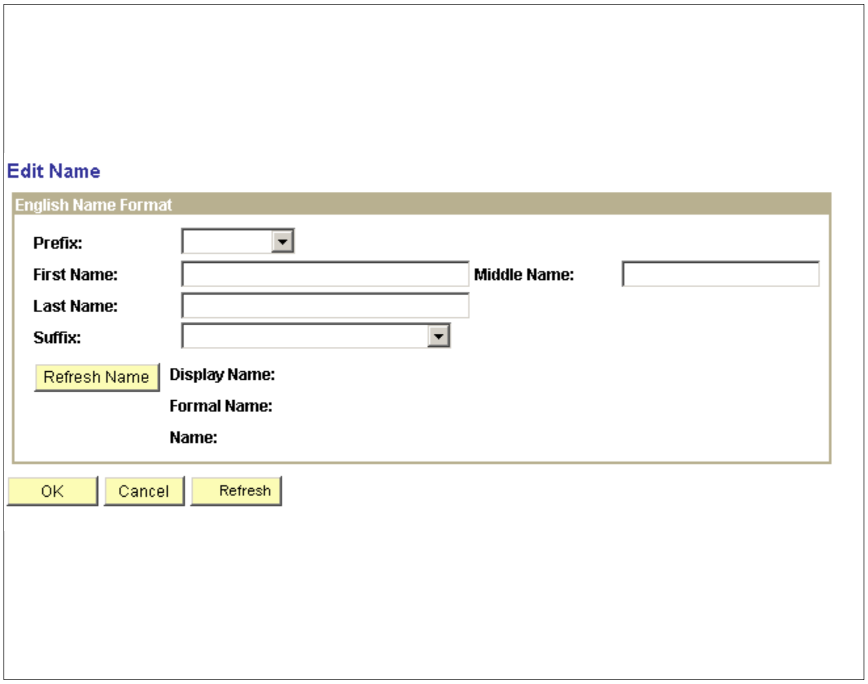

Figure 85. Edit Name page

2. Complete the fields as follows:

Prefix Select the applicable prefix from the drop-down menu. The valid values are as follows:

Prefix Valid Values
Dr
Miss
Mr
Mrs
Ms

First Name Enter the first name.

Middle Name Enter the middle name.

Last Name Enter the last name.

Suffix	Select the applicable suffix from the drop-down menu. Valid values are as follows:

Suffix Valid Values
III
Junior
Senior

3. Click **Refresh Name**. The information entered on the Edit Name page is displayed in the corresponding fields.

Display Name	This field is populated with the information entered in the fields above.
Formal Name	This field is populated with the information entered in the fields above.
Name	This field is populated with the information entered in the fields above.

Add Address Detail

Adding Address Detail:

1. Click the ***Add Address Detail*** link. The Address History page (**Figure 86**) is displayed.

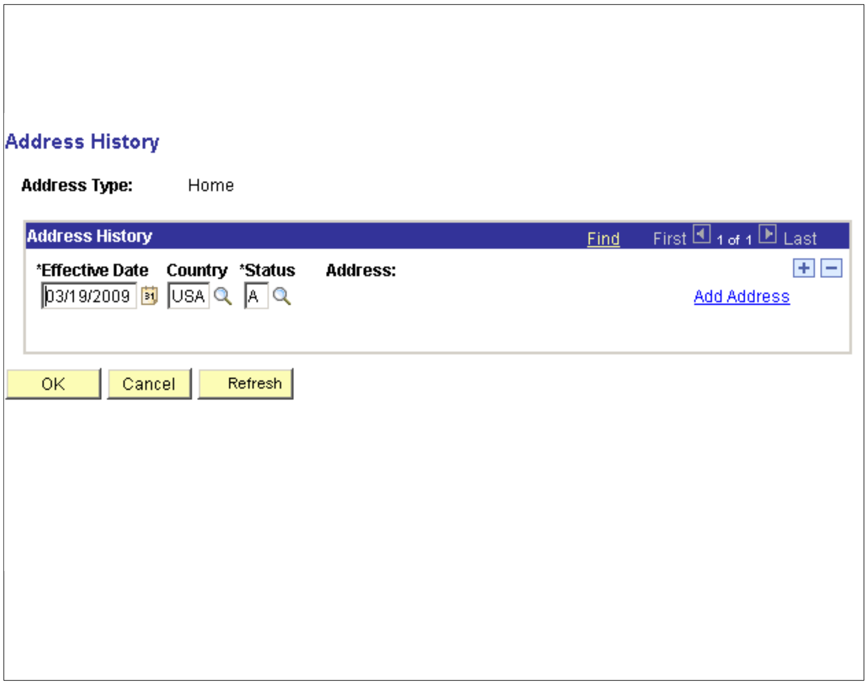

Figure 86. Address History page

2. Complete the fields as follows:

Address Type	This field is populated.
***Effective Date**	Enter the effective date or select a date by clicking on the calendar icon.
Country	Enter the country or select a country by clicking on the search icon.
***Status**	Enter the status or select a status by clicking on the search icon.
Address	This field is populated with information from the ***Add Address*** link. Refer to field instructions below.

Add Address

Add Address:

1. Click the ***Add Address*** link. The Edit Address page (**Figure 87**) is displayed.

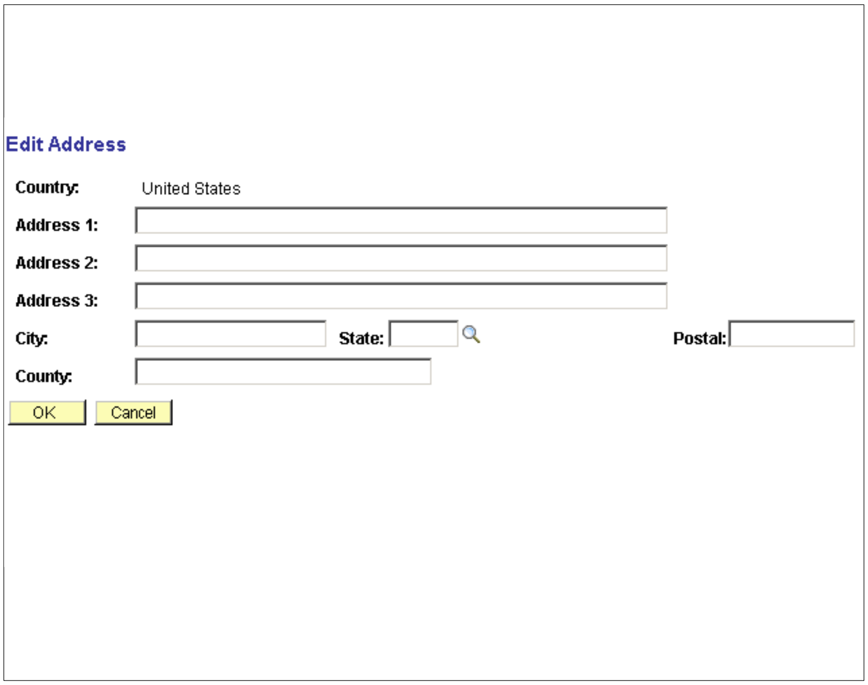

Figure 87. Edit Address page

2. Complete the fields as follows:

Country	Enter the country or select a country by clicking on the search icon.
Address 1	Enter the first line of the address.
Address2	Enter the second line of the address if applicable.
Address 3	Enter the third line of the address if applicable.
City	Enter the city.
State	Enter the state or select a state by clicking on the search icon.
Postal	Enter the postal code.

County	Enter the county

3. Click **OK**. The information entered is saved and the Address History page (**Figure 86**) is displayed.

   OR

   Click **Cancel**. The information entered is not saved and the Address History page (**Figure 86**) is displayed.

Heading Index

This index provides an alphabetical list of all headings in the procedure. When a heading is referenced, you can use this index to locate the page number.

V